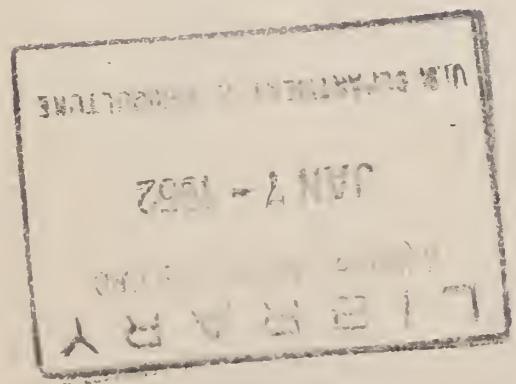


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FOREIGN AGRICULTURE CIRCULAR



OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
APR 1952 WASHINGTON, D.C.

T 1-52

March 14, 1952

UNITED STATES TOBACCO EXPORT SITUATION

Combined exports of leaf tobacco during the current marketing year (July-June for flue-cured and October-September for other types) are expected to exceed those of 1950-51 and other postwar years except 1945-46 and 1946-47 when they were at a near record level. The increase over 1950-51 will result primarily from substantially larger exports of flue-cured leaf, the principal export type. Exports during 1951-52 of Burley, which has been the second most important export type in postwar years, will probably exceed the 1950-51 level. An increase is also anticipated for Black fat. Exports of Kentucky-Tennessee fire-cured will probably be below the relatively high 1950-51 level and 1951-52 exports of other types will probably not vary greatly from quantities sent abroad in 1950-51.

Substantially larger exports of flue-cured leaf to the United Kingdom during 1951-52 will account for most of the increase in combined leaf exports for the year. The larger shipments to the United Kingdom are for stock replacements and do not reflect increased requirements for consumption. Exports of Burley leaf are expected to be somewhat higher in 1951-52 as a result of the increased takings by Continental Europe, where stocks of the leaf are low and demand remains strong as a result of a continued shift to blended type cigarettes. Exports of Black fat during the October-December quarter of 1951 were substantially above the corresponding period in 1950. The increased shipments are attributed to generally good economic conditions in West African and other countries to which shipments are made. Exports of fire-cured, dark air-cured, and Maryland tobaccos during the first quarter of the 1951-52 marketing year were below the corresponding quarter of the 1950-51 year. Shipment of Kentucky-Tennessee fire-cured are expected to continue below the 1950-51 level as supplies of loan tobacco available for export at reduced prices, and which accounted for a substantial part of 1950-51 exports, are largely exhausted. Exports of the two other types, however, may increase during subsequent quarters of the current marketing year and about equal 1950-51 exports.

Combined leaf exports during the three months, October-December 1951, totaled 208,305,000 pounds, or 25 percent above the 166,600,000 pound total for the comparable 1950 period. The United Kingdom and Ireland continued to be the most important export outlet during the quarter, taking 131,817,000 pounds, or 63 percent of the total. This is close to double the 77,180,000 pounds sent to those countries during October-December 1950. Continental Europe ranked second in importance but shipments to this area totaled only 44,226,000 pounds as compared with 61,774,000 pounds in the corresponding period in 1950. Asiatic

countries ranked third, taking 12,004,000 pounds as compared with 9,475,000 pounds during the corresponding 1950 period. The remaining 20,258,000 pounds exported in October-December 1951 was divided between the following areas: Australia and New Zealand, 11,340,000 pounds; Africa, 7,209,000 pounds; Latin America, 1,603,000 pounds; and all "other" areas, 106,000 pounds.

Exports by Types:

Exports of flue-cured leaf during the first six months (July-December 1951) of the 1951-52 marketing year totaled 315,585,000 pounds or 21 percent above the 260,021,000 pounds exported during the corresponding period of the 1950-51 marketing year. The increase resulted from larger purchases by the United Kingdom. Shipments to the United Kingdom and Ireland during the period total 212,660,000 pounds as compared with 141,024,000 pounds during the first 6 months of the 1950-51 marketing year. Shipments of flue-cured leaf to all other areas totaled only 102,925,000 pounds as compared with 118,907,000 during the first 6 months of the 1950-51 marketing year.

Burley exports during the first 3 months (October-December 1951) of the 1951-52 marketing year totaled 7,037,000 pounds or somewhat below the 7,962,000 pounds exported during October-December 1950. Germany, the most important export outlet during this period, took 1,269,000 pounds; Belgium-Luxembourg ranked second, taking 1,104,000 pounds; the majority of the remaining 4,664,000 pounds were taken by other Continental European countries. The use of Burley type leaf in cigarette manufacturing abroad has increased considerably during the post-war years; however, foreign manufacturers still are using less Burley in blended cigarettes than United States manufacturers.

Exports of Fire-cured leaf during October-December 1951 totaled 6,957,000 pounds, comprised of 5,698,000 pounds of Kentucky-Tennessee fire-cured leaf and 1,259,000 pounds of Dark Virginia leaf. This is comparable with total fire-cured exports of 8,199,000 pounds during the corresponding 1950 period, which was comprised of 6,583,000 pounds of Kentucky-Tennessee fire-cured and 1,616,000 pounds of Dark Virginia leaf. Continental Europe, most important export outlet of this type, took 69 percent of total fire-cured leaf during this 1951 period; Africa ranked second, taking 22 percent. The remaining 9 percent was taken in varying quantities by numerous other areas, including Asia, Australia, New Zealand, and Latin America.

Exports of other type leaf during the October-December 1951 include the following: Maryland, 1,672,000 pounds; Green River, 184,000 pounds; One Sucker, 620,000 pounds; Black Fat, 1,725,000 pounds; Cigar leaf, 1,876,000 pounds; Perique, 30,000 pounds; and Stems and Scraps, 1,221,000 pounds.

TOBACCO (unmanufactured): Exports from the United States by types, 1951-52 marketing year through December 1951 with comparisons 1/

(Export Weight)

							Marketing Years
							through December
	Average	1948-49	1949-50	1950-51	1950-51	1951-52	
	1934-35						
	1938-39						
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds	pounds
Flue-cured.....	318,865	337,247	388,640	377,156	260,021	315,585	
Burley.....	10,900	36,519	35,711	26,150	7,962	7,037	
Kentucky-Tennessee							
	Fire-cured.....	51,389	31,994	20,246	30,134	6,583	5,698
	Dark Virginia.....	9,503	5,777	5,250	4,836	1,616	1,259
	Maryland.....	5,189	8,919	7,123	8,092	1,762	1,672
	Green River.....	3,030	3,055	1,031	2,324	583	184
	One Sucker.....	886	6,208	2,131	3,599	648	620
	Black Fat.....	8,974	5,171	3,237	4,355	1,141	1,725
	Cigar Leaf.....	1,380	20,688	9,706	6,213	1,196	1,876
	Perique.....	129	32	98	38	13	30
	Stems and Scrap....	19,497	7,730	3,066	5,676	2,914	1,221

1/ Flue-cured marketing year July-June, all other types October-September. The data include stemmed and unstemmed leaf. The two kinds are combined as reported, i.e., stemmed leaf has not been converted to an unstemmed basis.

Compiled from official records of the Bureau of the Census, U.S. Department of Commerce.

TOBACCO (unmanufactured): Exports from the United States to designated regions, total and by types, October-December 1950 and 1951

(Export Weight)

Compiled from official records of the Bureau of the Census, U.S. Department of Commerce.

114
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FOREIGN AGRICULTURE CIRCULAR



OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FT 2-52

March 31, 1952

WORLD FLUE-CURED TOBACCO PRODUCTION AT NEW RECORD LEVEL

The estimated world flue-cured tobacco production of 2,377 million pounds during the fiscal year July 1951-June 1952 surpasses the preceding year's record level of 1,988 million pounds by 20 percent and the 1949-50 output of 1,811 million pounds by 31 percent. Substantial increases in output occurred in many of the important producing countries and especially in the United States, China, Southern Rhodesia, and Canada. Decreases were recorded for Brazil, the Union of South Africa, India, Pakistan, and New Zealand.

Increased world demand for flue-cured leaf, used mostly in the manufacture of Virginia-type and United States blended cigarettes, has resulted in a progressive increase in output of this type of tobacco. Consumers in practically all countries are shifting from products containing dark and cigar tobacco to flue-cured and other light types used principally in cigarettes. Effective world demand for flue-cured leaf, especially United States flue-cured, would probably be substantially larger if it were not for restrictions by many countries on the use of foreign exchange for the import of tobacco.

United States. The 1951 flue-cured crop was 14 percent above the latest estimate for 1950 and 29 percent above 1949. The estimated 1951 production is 1,434 million pounds from 1,110,000 acres. This compares with 1,257 million pounds from 958,400 acres in 1950 and 1,115 million pounds from 935,400 acres in 1949. Increased acreage planted to flue-cured leaf was responsible for increased production, as the 1951 yield per acre was slightly less than the 1950 yield. The United States crop represented 60 percent of the estimated world production of flue-cured tobacco in 1951. This compares with 63 percent in 1950, 62 percent in 1949, and a prewar annual average of 70 percent.

Canada. Flue-cured production in Canada in 1951 is estimated at 141.6 million pounds, an all-time record. It was 31 percent above the 1950 output of 108.2 million pounds, and 21 percent above the 116.7 million pounds, the previous record crop produced in 1949. A larger acreage as well as increase in yield per acre were responsible for the higher 1951 production. The yield per acre for 1951 is estimated at 1,276 pounds, a near record yield, as compared with 1,175 pounds in 1950 and 1,286 pounds, an all-time record yield, in 1949.

China. China's 1951 flue-cured harvest (excluding Manchuria) is estimated at 260 million pounds from 297,000 acres as compared with only 80 million pounds from 81,000 acres in 1950.

India. Glue-cured production in India decreased from 104.5 million pounds, a revised estimate for 1950-51, to 95.0 million pounds in 1951-52. This is a decrease of 9 percent, and is attributed to adverse weather conditions during the growing season. Information regarding acreages shows increases in both 1950-51 and 1951-52.

Japan. Japan's 1951 flue-cured production is estimated at 108.7 million pounds from 72,911 acres. This is slightly higher than the 1950 output of 105.6 million pounds from 64,665 acres, and much higher than the 67.6 million pounds from 51,346 acres produced in 1949.

Other Far Eastern Countries. Total flue-cured production in Korea, Thailand (Siam), Pakistan, Taiwan, (Formosa) and Manchuria is estimated at 48.7 million pounds as compared with 67.0 million pounds produced in those countries in 1950-51. For other Far Eastern countries where production is limited, the 1951-52 output is estimated above the 1950-51 and 1949-50 harvests.

Southern Rhodesia. Flue-cured leaf production in 1951-52 is unofficially estimated at 110 million pounds from 194,000 acres. This is a substantial increase over the 87.5 million pounds from 172,000 acres produced in 1950-51. It is reported that the quality of this season's leaf will be below average due to excessive rainfall during the growing season. Heavy rains also lowered the production from early season expectations and some observers report that there may be further reduction in output before the crop is harvested and cured.

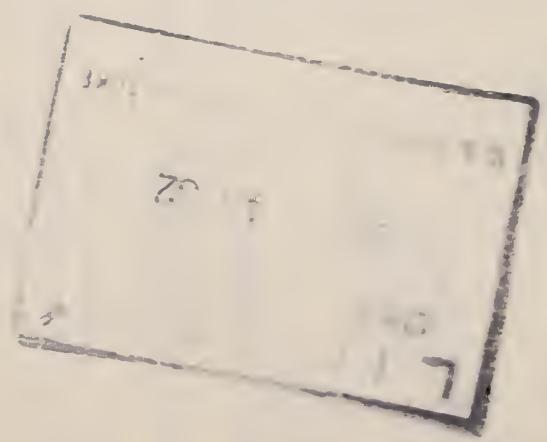
Other Countries. The Union of South Africa's 1951-52 production is placed at only 17.8 million pounds as compared with 21.4 million pounds in 1950-51. The decrease results from drought conditions during the current growing season. The remaining important African flue-cured producing countries, namely, Northern Rhodesia and Nyasaland, report larger 1951-52 harvests. Brazil's 1951-52 flue-cured production is estimated at 33.1 million pounds as compared with nearly 45.0 million pounds in 1950-51. The decrease is attributed to lower yields per acre due to unfavorable growing conditions during the season. Other countries producing flue-cured leaf, and for which changes in production from 1950-51 were limited, include Argentina, Mexico, El Salvador, Nicaragua, Italy, Spain, British East Africa, New Zealand, and Australia.

FLUE-CURED TOBACCO: World acreage and production, 1951 with comparisons 1/

Country	Acreage			Production				
	Average 1935-39	1949	1950	1951 2/	Average 1935-39	1949	1950	1951 2/
Acres	Acres	Acres	Acres	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	
Canada	50,703	90,733	92,080	111,020	54,616	116,668	108,202	141,625
Mexico	3/	3/	3/	3/	4/	800	4,630	3,750
United States	981,400	935,400	958,400	1,110,100	863,620	1,114,508	1,257,280	1,433,650
Italy	3/	8,157	9,214	10,853	2,846	14,775	19,460	21,164
China	132,800	3/	80,723	297,000	150,900	3/	80,000	260,000
Manchuria	10,540	3/	3/	3/	13,930	3/	3/	3/
Pakistan	5/	1,600	5,500	4,500	5/	1,308	4,165	4,000
India	67,000	150,000	151,346	164,665	3/	31,280	95,400	104,500
Japan	40,830	1,988	16,595	12,444	72,911	62,350	67,608	95,000
Taiwan (Formosa)	7,674	13,118	16,233	3/	14,245	3,235	18,982	108,704
Korea	3/	33,620	45,600	56,000	3/	11,839	22,146	12,278
Thailand (Siam)	955	6,425	12,355	12,385	4/	3/	9,920	17,196
Argentina	4/	32,247	32,123	33,606	3/	918	6,173	3/
Brazil	3/	5,000	3/	3/	3/	2,574	43,375	16,535
Nyasaland	3/	15,500	152,717	172,000	3/	3/	2,604	11,023
Northern Rhodesia	3/	32,201	3/	192,000	3/	3/	7,000	13,228
Union of South Africa	3/	4,561	6,628	7,678	3/	3/	105,492	14,000
Australia	9,913	1,740	3,899	3,950	5,276	5,276	21,108	87,500
New Zealand	37,170	215,015	316,482	335,565	3,666	1,370	4,138	110,000
All other countries 6/	37,170	215,015	316,482	335,565	2,682	2,682	4,700	17,800
Estimated World Total	1,390,723	1,768,134	1,828,397	2,261,529	1,237,855	1,811,189	1,987,727	2,376,592

1/ Year beginning July 1. For north temperate zone countries, harvests July through October of the year shown; for all other countries, harvests January through June of the following year. 2/ Preliminary. 3/ Data not available. 4/ Less than a 5-year average. 5/ No flue-cured production in prewar years. 6/ Includes approximations for countries not listed, and where data not available.

Office of Foreign Agricultural Relations. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research and other information.



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FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

JUN 10 1952

FT 3-52

May 12, 1952

WORLD TOBACCO TRADE INCREASES IN 1951

World trade in unmanufactured tobacco during 1951 was 6 percent above 1950 and 9 percent above the prewar (1935-39) average. Exports from the principal countries totaled 1,293,923,000 pounds. This corresponds to 1,200,241,000 pounds in 1950 and the prewar (1935-39) average of 1,153,710,000 pounds.

The 1951 increase resulted primarily from higher exports from the United States, Turkey, Greece, India, and the Philippine Republic, partially offset by decreases from Southern Rhodesia, Italy, Yugoslavia, and Brazil.

World totals for countries listed in the accompanying table show exports consistently above imports. This discrepancy results from a number of factors including reexports (which had not been shown as imports) in the export data, the omission of relatively large imports into the Soviet Union for which data are not available, and the omission from the table of a number of countries which have a small tobacco trade and whose exports materially exceed imports.

Principal Exporting Countries: In 1951, the United States continued to be the leading exporting country. Exports for the year totaled 522,089,000 pounds, or 9 percent above the 1950 total and comprised 40 percent of the world total. The increase was due to larger leaf exports to the United Kingdom, France, Spain, and Belgium-Luxembourg.

Of the total United States exports, flue-cured leaf accounted for 433,768,000 pounds, or 83 percent. This is comparable to 383,807,000 pounds, or 80 percent in 1950. Burley exports in 1951 totaled 25,225,000 pounds, or 5 percent of the total as compared with 37,601,000 pounds, or 8 percent in 1950. Exports of fire-cured leaf totaled 34,728,000 pounds, in 1951 as compared with 29,817,000 pounds in 1950.

For all of the Latin-American tobacco-exporting countries combined, exports in 1951 were 11 percent below 1950. Substantial decreases were reported for Argentina, Brazil, Paraguay, and Peru. However, the decrease was offset by slight increases in Colombia, Cuba, and the Dominican Republic. Most of Latin American exports went to Western European countries.

The Oriental-type tobacco producing countries of Southeastern Europe reported slightly lower exports for 1951. However, Greece reported a substantial increase. Total exports for the Near East were higher in 1951 than in 1950, primarily because of the 15 percent increase reported for Turkey.

TOBACCO, UNMANUFACTURED: International trade,
average 1935-39, annual 1950 and 1951

Continent and Country	Average 1935-39		1950 1/		1951 1/	
	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>NORTH AMERICA</u>						
Canada.....	15,294:	4,317:	26,760:	1,322:	29,422:	1,152
Costa Rica.....	- :	40:	66:	80:	- :	88
El Salvador.....	23:	495:	- :	2,487:	- :	3,000
Guatemala.....	- :	68:	- :	436:	- :	751
Honduras.....	1,894:	43:	7,015:2/	125:	3/:	3/
Mexico.....	215:	210:	608:	2,736:	656:	1,833
Nicaragua.....	- :	175:	- :	651:	- :	613
United States.....	420,797:	71,274:	477,596:	90,031:	522,089:	104,652
Cuba.....	27,712:	- :	31,818:	- :	27,600:	-
Dominican Republic..	13,652:	- :	31,910:	- :	35,257:	-
Total.....	479,587:	76,622:	575,773:	97,868:	615,024:	112,089
<u>EUROPE</u>						
Austria.....	4/ 1,424:4/	16,954:	2,543:	17,397:	372:	21,138
Belgium and Luxembourg.....	5/ 413:	40,695:	- :	47,226:5/	5,692:	54,143
Bulgaria.....	59,396:	- :6/	20,000:	- :	3/:	-
Czechoslovakia.....	- :4/	20,768:	- :6/	20,000:	- :	3/
Denmark.....	490:	20,206:	1,158:	30,515:	- :	22,108
Ireland.....	4/ 394:4/	12,292:	- :	19,729:	- :	18,598
Finland.....	- :	7,754:	- :	9,414:	- :	10,170
France.....	4/ 686:4/	61,576:	145:	46,097:	137:	69,725
Germany.....	4/ 19:4/204,644:7/	- :104:7/	99,004:7/	782:7/	101,919	
Greece.....	97,657:	20:	56,669:	- :	69,385:	-
Hungary.....	19,162:	3,106:6/	4,000:6/	2,400:	3/:	3/
Italy.....	12,927:	5,253:	20,897:	9,056:2/	16,000:2/	6,000
Netherlands.....	5/ 3,249:	67,349:5/	3,446:	63,790:5/	4,733:	59,352
Norway.....	- :	6,602:	- :	8,225:	- :	8,351
Poland.....	4/ 149:4/	18,404:	- :6/	8,000:	- :	3/
Portugal.....	- :	6,381:	- :	10,381:	- :	10,483
Spain.....	- :6/	30,979:	- :	55,600:	- :	46,883
Sweden.....	153:	14,829:	- :	18,874:	- :	26,076
Switzerland.....	- :	15,795:	11:	22,760:	- :	23,433
United Kingdom.....	5/ 5,996:	258,486:	- :	305,805:	- :	355,804
Yugoslavia.....	10,288:	8,010:	17,278:	1,896:	13,488:	11,388
Total.....	212,403:	820,103:	126,251:	796,169:	110,589:	845,571
<u>ASIA</u>						
Lebanon.....	(:	(:	(:	(:	811:	1,087
Syria.....	(2,762:	(112:	(6,568:	(1,887:	7,569:	617
Turkey.....	78,054:	152:	110,677:	- :	127,500:	-
Ceylon.....	2,086:	1,200:	1,363:	1,625:	1,007:	1,927
China.....	30,994:	56,613:	3/:	3/:	3/:	3/
French Indochina....	4/ 216:	2,718:	- :	11,502:	- :	3/
Hong Kong.....	3/:	10,450:	6,052:	9,491:	37,470:	25,276
India.....	43,500:	4,791:	88,533:	8,382:	109,441:	5,348

TOBACCO, UNMANUFACTURED: International trade,
average 1935-39, annual 1950 and 1951

Continent and Country	Average 1935-39		1950 1/		1951 1/	
	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<u>ASIA (Cont'd)</u>	:	:	:	:	:	:
Japan	14,700	5,458	884	2,769	1,530	3,649
Indonesia	101,176	2,765	28,111	8,860	28,473	14,588
Philippine Republic	37,357	1,075	8,137	28,792	13,856	9,871
Thailand (Siam)....	13	3,405	-	2,925	-	1,697
Total.....	310,858	88,739	250,325	76,233	327,657	64,060
<u>SOUTH AMERICA</u>	:	:	:	:	:	:
Argentina.....	180	16,878	2/ 770	8,157	- 2/	6,000
Brazil.....	71,955	772	80,850	234	2/ 70,000	350
British Guiana.....	- 4/	393	-	643	-	516
Chile.....	-	172	-	737	-	752
Colombia.....	6,472	138	7,174	521	2/ 10,000	900
Paraguay.....	7,747	202	7,800	-	5,886	105
Peru.....	-	212	-	843	-	850
Surinam.....	3/	3/	-	104	- 2/	110
Uruguay.....	-	3,051	-	9,261	-	10,171
Total.....	86,354	21,818	96,594	20,500	85,886	19,754
<u>AFRICA</u>	:	:	:	:	:	:
Algeria.....	24,979	7,482	23,677	8,512	29,870	9,493
French Morocco.....	- 4/	3,921	-	5,426	-	3,856
Belgian Congo.....	- 5/	1,000	-	3,137	-	6,142
Nyasaland.....	12,810	-	23,758	-	27,000	-
Egypt.....	-	13,014	-	28,345	-	27,910
Gold Coast.....	-	1,471	-	1,341	-	1,657
Madagascar.....	5,262	17	6,281	66	9,594	44
Northern Rhodesia...	1,429	-	6,175	-	10,467	-
Southern Rhodesia...	19,166	327	89,315	15	2/ 75,000	-
Tunisia.....	- 4/	2,843	-	5,811	11	4,888
Union of South Africa.....	635	3,100	2,091	4,271	2,823	4,536
Total.....	64,281	33,175	151,297	56,924	154,765	58,526
<u>OCEANIA</u>	:	:	:	:	:	:
Australia.....	114	21,537	1	25,799	2	24,728
New Zealand.....	113	3,027	-	5,629	- 2/	7,000
Total.....	227	24,564	1	31,428	2	31,728

Total countries shown: 1,153,710: 1,065,021: 1,200,241: 1,079,122: 1,293,923: 1,131,728

1/ Preliminary. 2/ Estimated on the basis of data available for 6 months or more of the year. 3/ Not available. 4/ Less than a 5-year average. 5/ Reexports.

6/ Approximated from unofficial information. 7/ Western Germany only; data for Eastern Germany not available.

Unmanufactured tobacco exports from Far Eastern Countries in 1951 show a sizeable increase when compared with 1950. Increases were reported for India, Indonesia, Japan, and the Philippine Republic. India's 1951 exports totaled 109,441,000 pounds as compared with the 1950 total of 88,533,000 pounds. Indonesian exports for 1951 totaled 28,473,000 pounds as compared with 28,111,000 pounds in 1950. Japan exported 1,530,000 pounds in 1951 as compared with only 884,000 pounds in 1950. The Philippine Republic reported a sizeable increase by exporting 13,856,000 pounds in 1951 as compared with only 8,137,000 pounds in 1950.

Principal Importing Countries: The United Kingdom's 1951 imports totaled 355,804,000 pounds, which were larger than the imports for any other country, and 16 percent above the 1950 total of 305,805,000 pounds. The 1951 United Kingdom's imports accounted for 31 percent of total world imports.

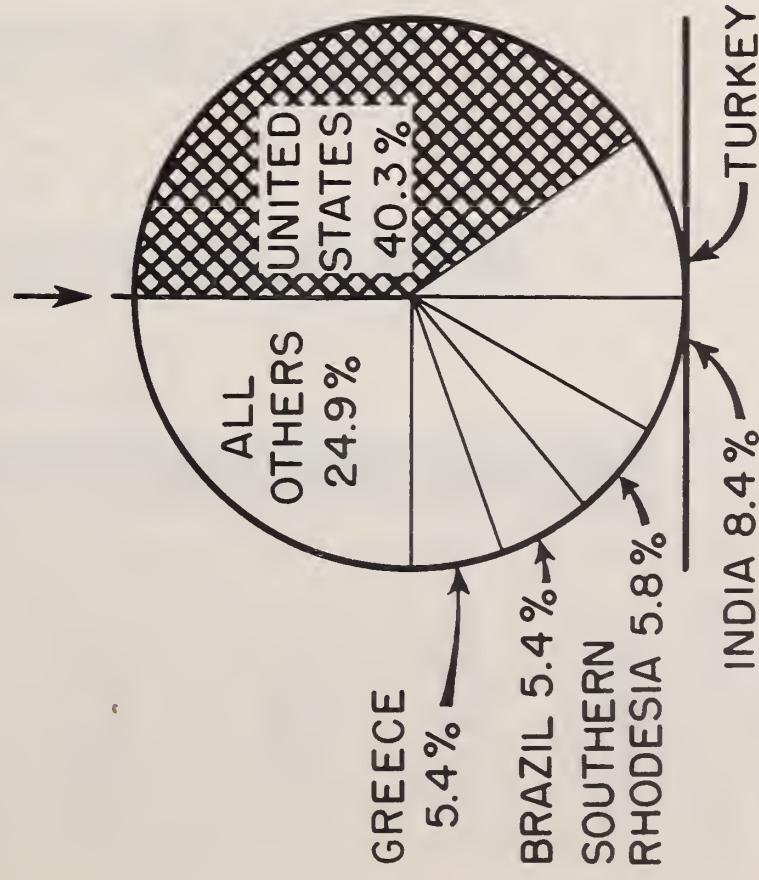
Imports in 1951 into the United States, which ranked second in total imports of unmanufactured tobacco, were 104,652,000 pounds, or 16 percent above the 1950 total of 90,031,000 pounds. The majority of 1951 imports were supplied by Turkey. However, some leaf was imported from Cuba, Brazil, Dominican Republic, Indonesia, Philippine Republic, Canada, and Greece.

Western Germany, the third most important 1951 importing country, took 101,919,000 pounds, or about 3 percent more than the 1950 total of 99,004,000 pounds.

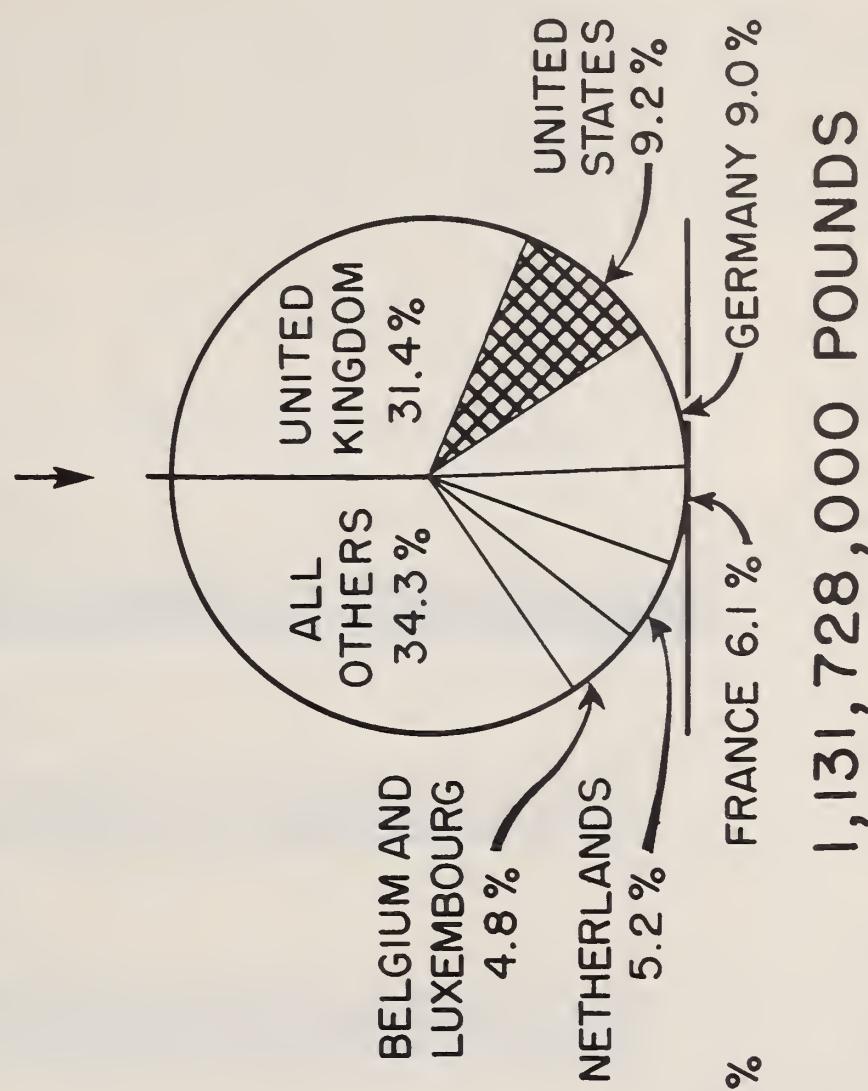
All Other Leading Importing Countries: Imports in 1951 exceeded 1950 in the following countries: Austria, Belgium and Luxembourg, Finland, France, Norway, Portugal, Sweden, Yugoslavia, Uruguay, Algeria, Belgian Congo, Union of South Africa, and Indoensia. Decreases were reported for Australia, Egypt, French Morocco, India, Philippine Republic, the Netherlands, Italy, Ireland, Spain, Denmark, and Mexico. -- By C. E. Dobbins, based in part upon U. S. Foreign Service reports.

TOBACCO: PERCENTAGE OF TOTAL EXPORTS AND IMPORTS, BY SPECIFIED COUNTRIES 1951

EXPORTS



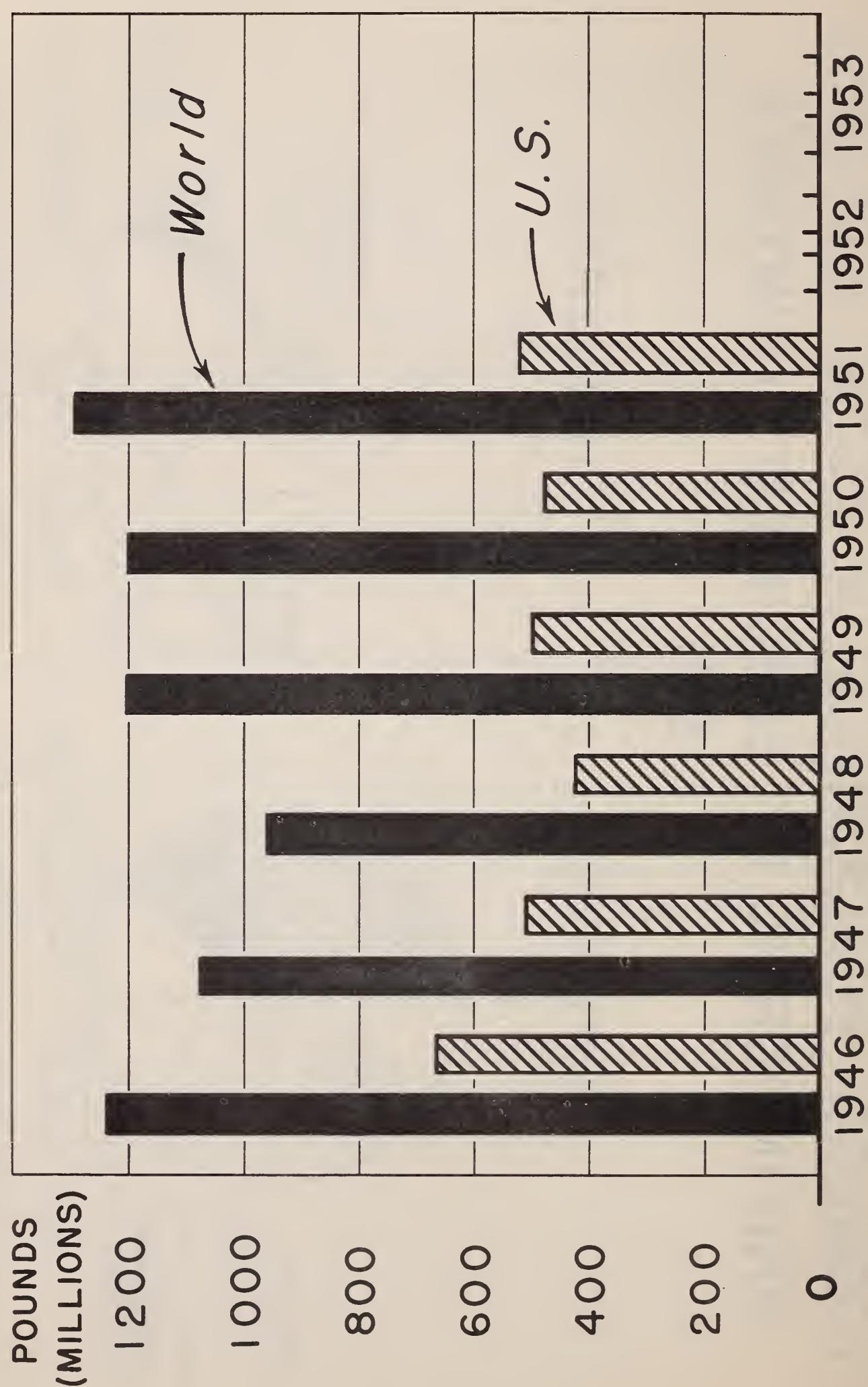
IMPORTS



1,293,923,000 POUNDS

1,131,728,000 POUNDS

TOBACCO: TOTAL WORLD AND U. S. EXPORTS





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

CURRENT SERIAL RECORD
★ JUN 24 1952 ★

FT 4-52

June 3, 1952

UNITED STATES TOBACCO EXPORT SITUATION

Combined exports of leaf tobacco during the current marketing year (July-June for flue-cured and October-September for all other types) are expected to exceed those of 1950-51 and other postwar years except 1945-46 and 1946-47 when they were at a near record level. The increase over 1950-51 will result primarily from larger exports of flue-cured leaf, the most important export type. Kentucky-Tennessee fire-cured, which is the second most important export type during 1951-52 will probably be below the 1950-51 total. Burley exports during 1951-52 are expected to exceed the last marketing year's total. Exports of cigar leaf and Black Fat are also expected to exceed last season's total, while relatively little change is expected for all other types.

Substantially larger exports of flue-cured leaf to the United Kingdom during 1951-52 will account for most of the increase in combined leaf exports for the year. The larger shipments to the United Kingdom are for stock replacements and do not reflect increased requirements for consumption. Exports of Burley leaf are expected to be somewhat higher in 1951-52 as a result of the increased takings by Continental Europe, where stocks of the leaf are low and demand remains strong as a result of a continued shift to blended type cigarettes. Exports of Black Fat during the October-March semester of 1951-52 were substantially above the corresponding period in 1950. The increased shipments are attributed to generally good economic conditions in West African and other countries to which shipments are made. Exports of Maryland and Cigar Leaf increased substantially during this period. Shipments of Kentucky-Tennessee fire-cured are expected to continue below the 1950-51 level. Exports of other types, however, may increase during the subsequent quarter of the current marketing year and about equal or exceed 1950-51 exports.

Combined exports during the three months, January-March 1952 totaled 89,132,000 pounds, or 10 percent above the 81,213,000 pounds during the corresponding 1951 period. Continental Europe, the most important outlet during this 1952 period, took 34,217,800 pounds as compared with 37,194,000 pounds in the same 1951 quarter. The United Kingdom and Ireland ranked second, taking 23,050,000 pounds as compared with 17,781,000 during January-March 1951. Asiatic countries ranked third, taking 19,263,000 pounds, as compared with only 11,199,000 during the corresponding 1951 period. The remaining 12,602,000 pounds exported during January-March 1952 was taken by the following countries: Australia and New Zealand 7,377,000 pounds; Africa 3,355,000 pounds; Latin America 1,530,000 pounds; and "all other" 340,000 pounds.

Exports by types

Exports of flue-cured leaf during July 1951 through March 1952 totaled 387,966,000 pounds, or 20 percent above the 323,413,000 pounds exported during the corresponding 1950-51 period. The increase resulted from larger takings by the United Kingdom. Shipments to the United Kingdom during the first 9 months of the 1951-52 marketing period totaled 231,730,000 pounds as compared with only 156,225,000 during the same 1950-51 period.

Burley exports during the first 6 months (October 1951-March 1952) of the 1951-52 marketing year totaled 11,436,000 pounds as compared with a slightly higher total of 12,935,000 pounds during the corresponding 1950-51 period. The use of Burley leaf in cigarette manufacturing abroad has increased considerably in postwar years but the manufacturers are still using less of this type in blended cigarettes than the United States.

Exports of other types during January-March 1952 included: Kentucky-Tennessee fire-cured 6,659,000 pounds; Dark Virginia 901,000 pounds; Maryland 1,253,000 pounds; Green River 1,077,000 pounds; One Sucker 423,000 pounds; Black Fat 828,000 pounds; Cigar Leaf 1,262,000 pounds Perique 17,000 pounds; and Stems and Scrap, 979,000 pounds.

TOBACCO (unmanufactured): Exports from the United States by types,
1951-52 marketing year through March 1952 with comparisons 1/

(Export Weight)

Types	Totals for Marketing Years						Marketing Years through March				
	Average		1934-35		1948-49		1949-50	1949-50	1950-51	1951-52	
	1,000		1,000		1,000		1,000	1,000	1,000	1,000	
	pounds	pounds	pounds	pounds	pounds	pounds	pounds	pounds	pounds	pounds	
Flue-cured.....	318,865		337,247		387,118		312,208		323,413		387,966
Burley.....	10,900		36,519		35,631		12,727		12,935		11,436
Kentucky-Tennessee..											
Fire-cured.....	51,389		31,994		20,246		6,895		14,154		12,357
Dark Virginia.....	9,503		5,777		6,851		2,627		2,784		2,160
Maryland.....	5,189		8,919		7,223		3,298		2,712		2,925
Green River.....	3,030		3,055		1,031		700		1,045		1,261
One Sucker.....	886		6,208		2,131		1,159		1,101		1,043
Black Fat.....	8,974		5,171		3,231		1,510		1,800		2,552
Cigar Leaf.....	1,380		20,688		9,706		4,367		2,177		3,138
Perique.....	129		32		98		34		14		46
Stems and Scrap....	19,497		7,730		3,066		859		3,517		2,200

1/ Flue-cured marketing year July-June, all other types October-September. The data include stemmed and unstemmed leaf. The two kinds are combined as reported, i.e., stemmed leaf has not been converted to an unstemmed basis.

Compiled from official records of the Bureau of the Census, U. S. Department of Commerce.

TOBACCO (unmanufactured): Exports from the United States to designated regions, total and by types, January-March 1952 with comparisons 1/

(Export weight)

Region	All types		Flue-cured		Burley		Ky. & Tenn.	
	1951	1952	1951	1952	1951	1952	1951	1952
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
United Kingdom & Ireland....	17,781	23,050	15,201	19,070	271	279	1,367	2,600
Cont'l Europe...	37,194	34,217	25,431	24,199	3,943	3,425	5,467	3,555
Africa.....	3,161	3,355	815	828	220	108	610	391
Asia.....	11,199	19,263	11,047	19,031	61	159	0	8
Australia & New Zealand..	9,026	7,377	8,747	7,029	61	114	0	33
Latin America...	2,798 ^{2/}	1,530	2,151	1,032	417	313	111	50
All others.....	54	340	0	144	0	0	16	22
Total.....	81,213 ^{2/}	89,132	63,392	71,333	4,973	4,398	7,571	6,659
Dark Virginia								
United Kingdom & Ireland....	526	53	0	0	406	1,033	0	0
Cont'l Europe...	349	624	592	925	0	4	98	98
Africa.....	0	0	313	293	56	31	334	325
Asia.....	38	0	44	0	0	0	7	0
Australia & New Zealand..	204	190	0	11	0	0	0	0
Latin America...	51	29	1	24	0	9	14	0
All others.....	0	0	0	0	0	0	0	0
Total.....	1,168	901	950	1,253	462	1,077	453	423
Black Fat								
United Kingdom & Ireland....	0	0	10	1	0	9	0	0
Cont'l Europe...	0	0	843	849	1	5	470	533
Africa.....	637	792	48	204	0	0	128	383
Asia.....	0	0	2	8	0	3	0	54
Australia & New Zealand..	0	0	14	0	0	0	0	0
Latin America...	12	22	36	40	0	0	5	9
All others.....	10	14	28	160	0	0	0	0
Total.....	659	828	981	1,262	1	17	603	979
Cigar Leaf								
United Kingdom & Ireland....	0	0	10	1	0	9	0	0
Cont'l Europe...	0	0	843	849	1	5	470	533
Africa.....	637	792	48	204	0	0	128	383
Asia.....	0	0	2	8	0	3	0	54
Australia & New Zealand..	0	0	14	0	0	0	0	0
Latin America...	12	22	36	40	0	0	5	9
All others.....	10	14	28	160	0	0	0	0
Total.....	659	828	981	1,262	1	17	603	979
Perique								
United Kingdom & Ireland....	0	0	10	1	0	9	0	0
Cont'l Europe...	0	0	843	849	1	5	470	533
Africa.....	637	792	48	204	0	0	128	383
Asia.....	0	0	2	8	0	3	0	54
Australia & New Zealand..	0	0	14	0	0	0	0	0
Latin America...	12	22	36	40	0	0	5	9
All others.....	10	14	28	160	0	0	0	0
Total.....	659	828	981	1,262	1	17	603	979
Stems & Scrap								
United Kingdom & Ireland....	0	0	10	1	0	9	0	0
Cont'l Europe...	0	0	843	849	1	5	470	533
Africa.....	637	792	48	204	0	0	128	383
Asia.....	0	0	2	8	0	3	0	54
Australia & New Zealand..	0	0	14	0	0	0	0	0
Latin America...	12	22	36	40	0	0	5	9
All others.....	10	14	28	160	0	0	0	0
Total.....	659	828	981	1,262	1	17	603	979

1/ Data include stemmed and unstemmed leaf. The two kinds are combined as reported, i.e. stemmed leaf has not been converted to an unstemmed basis.

2/ Includes two thousand pounds of Virginia sun-cured tobacco, separately classified beginning January 1952.



FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

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★ JUN 24 1952

FT 5-52

June 3, 1952

WORLD TOBACCO HARVEST LARGER THAN 1950-51

U.S. DEPARTMENT OF AGRICULTURE

The world tobacco harvest for the 12-months' period ending June 1952 is now estimated at 7,420 million pounds as compared with an earlier forecast of 7,435 million pounds. The current 1951-52 estimate is 1/ percent above the 7,137 million produced in 1950-51 and 12 percent above the prewar annual average (1935-39) of 6,597 million pounds. Excluding the Soviet Union, China, and most of Eastern Europe, 1/ from which little information is available, world production is placed at 5,490 million pounds, or 74 percent of the total world estimate.

Increased consumption in most countries is reflected in larger world tobacco production. Many of the large consuming countries are in a better economic condition than a year ago and are using more and better quality leaf. Even though stocks are above last year's level in many countries, they are still below the prewar annual average, thus indicating a good potential world tobacco market for 1952-53. However, restricted use of dollars by many countries in the Sterling area will tend to limit purchases of United States tobaccos. If proposed programs are carried out and favorable weather conditions prevail in other flue-cured producing countries, no substantial changes in production are anticipated for the coming year except possibly a larger crop of flue-cured leaf.

Tobacco production during 1951-52 in the United States increased about 15 percent; in Canada, 26 percent; Dominican Republic, 7 percent; Philippine Republic, 9 percent; Greece, 8 percent; Italy, 3 percent; Yugoslavia, 77 percent; and Southern Rhodesia, 31 percent. Decreases occurred in the following countries: Germany 30 percent; Turkey 3 percent; Japan 3 percent; Iran 19 percent; Brazil 16 percent; and the Union of South Africa 22 percent. Most countries reported leaf quality as being comparable or better than last season's output.

World flue-cured tobacco production of 2,395 million pounds during the fiscal year July 1951-June 1952 surpasses the preceding year's record level of 1,988 million pounds by 20 percent and the 1949-50 output of 1,811 million pounds by 32 percent. Substantial increases in output occurred in many of the

^{1/} In this analysis the following Eastern European countries are included: Albania, Bulgaria, Czechoslovakia, Hungary, Poland, and Rumania.

TOBACCO: Acreage, Yield per acre, and production in specified countries, average 1935-39, annual 1950 and 1951 1/

Continent and Country	Acreage Harvested			Yield Per Acre 2/			Production		
	Average		1950 3/	1,000 acres	Average		1950 3/	1,000 pounds	1,000 pounds
	1935-39	1,000 acres	102	119	1,03	1,182	1,265	76,558	120,298
NORTH AMERICA									
Canada.	69	102	119	1,103	1,182	1,265	76,558	120,298	151,165
Costa Rica.	4/	3	3	712	709	709	4/	2,278	1,984
Mexico.	51	67	-	915	-	42,426	42,426	61,288	59,524
United States.	1,647	1,599	1,781	1,269	1,269	1,460,054	1,460,054	2,029,567	2,328,226
Cuba.	107	146	144	540	540	520	50,853	78,272	75,000
Dominican Republic.	-	50	-	903	-	5/	22,209	45,170	48,501
Puerto Rico.	44	36	-	673	710	-	29,393	25,500	28,000
Estimated total 6/	1,960	2,055	2,250	-	-	-	1,710,000	2,393,200	2,705,000
EUROPE									
Albania.	5	-	4	-	826	-	4,082	-	-
Belgium.	6	-	5	2,500	2,275	2,150	16,431	10,119	11,477
Bulgaria 7/	94	-	-	809	-	75,871	-	-	-
Czechoslovakia 7/	24	-	5/	1,288	-	31,113	-	-	-
France.	44	71	68	1,676	1,654	72,995	117,450	116,844	-
Germany 7/	33	27	27	2,254	2,676	74,355	72,752	50,706	-
Greece.	226	254	238	589	506	583	132,819	128,043	138,890
Hungary 7/	37	-	-	1,238	-	45,872	-	-	-
Italy.	81	144	141	1,173	1,194	1,251	95,511	171,968	176,368
Poland 7/	17	39	-	1,664	-	28,566	-	-	-
Romania 7/	44	-	-	647	-	-	28,697	-	-
Spain.	-	28	37	-	1,202	1,190	17,322	34,171	34,092
Sweden.	1	1	1	1,735	1,460	1,560	1,061	685	655
Switzerland.	1	2	2	1,571	2,096	1,680	2,276	5,299	4,149
Yugoslavia.	39	83	92	969	422	674	37,410	35,000	62,000
Estimated total 6/	680	881	881	-	-	-	675,000	815,000	860,000
U.S.S.R.									
5/	490	-	-	5/	1,129	-	-	5/	525,000
ASIA									
Iran.	32	44	39	1,096	758	681	34,542	33,186	26,764
Iraq.	11	10	10	752	1,700	1,700	8,057	17,000	17,000
Lebanon 8/	5	6	5/	734	719	719	5/	3,907	4,332
Syria 8/	21	19	19	699	820	800	(8,825	16,830	15,375
Turkey.	317	300	661	590	603	603	128,505	187,270	180,777
Burma.	108	-	990	-	-	-	107,072	-	-
Ceylon.	14	-	11	-	682	659	4/	7,450	8,000
China 7/	1,228	-	-	1,021	-	-	1,254,539	14,330	-
French Indochina 5/	44	-	-	728	-	-	5/	32,004	-

ASIA (Continued)

India.....	5/	917	812	825	5/	831	679	5/	761,000	551,040	:
Pakistan 1/.....	5/	355	-	133	14	1,621	1,637	1,584	324,053	-	-
Japan.....	92	-	-	-	-	1,458	1,662	1,207	148,680	216,328	209,973
Formosa.....	4	12	-	-	-	1,252	1,223	-	5,961	21,065	17,196
Korea.....	46	49	-	-	-	-	-	-	57,304	60,000	-
Java and Madura: Estate.....	5/	69	18	-	5/	976	-	-	67,762	-	-
Native.....	5/	349	-	-	5/	402	-	-	140,298	-	-
Sumatra Estate.....	5/	31	9	-	5/	988	833	-	30,715	7,500	-
Philippine Republic.....	5/	176	126	138	5/	427	524	519	74,811	65,849	71,650
Thailand (Siam).....	5/	25	4/	4/	5/	688	-	-	17,179	40,000	-
Estimated total 6/.....		3,750	3,600	3,600		-	-	-	3,250,000	2,826,000	2,760,000

SOUTH AMERICA

Argentina.....	34	89	94	928	877	892	31,558	78,484	83,775	:	
Brazil.....	237	297	298	851	783	652	202,703	232,301	194,225		
Chile.....	9	9	8	1,846	1,797	1,724	16,618	15,994	13,161		
Colombia.....	5/	37	-	5/	803	-	-	45,000	45,000		
Ecuador.....	4/	22	4/	4/	-	-	5/	29,706	45,000		
Paraguay.....	2	12	-	-	801	-	5/	2,410	2,425	-	
Uruguay.....	2	1	1	825	911	-	17,792	11,023	8,818		
Estimated total 6/.....		355	485	488	1,025	1,244	1,254	1,254	661	741	

AFRICA

Algeria.....	56	80	76	691	526	542	38,667	42,815	40,968	:	
Nyasaland.....	57	160	-	286	194	-	16,311	31,000	36,000		
French Morocco.....	1	4	4	1,040	992	1,000	704	5,968	4,000		
Madagascar.....	5/	19	13	764	685	660	5/	14,164	8,906	8,576	
Northern Rhodesia.....	5/	4	22	486	450	-	5/	1,635	10,500	-	
Southern Rhodesia.....	51	174	194	507	508	597	26,061	88,208	115,845		
Tunisia.....	1	2	2	1,196	875	617	1,202	1,740	1,268		
Union of South Africa.....	5/	41	-	5/	500	-	5/	24,593	51,687	40,121	
Estimated total 6/.....		245	581	600	-	-	-	125,000	250,000	266,000	

OCEANIA

Australia.....	10	7	8	532	841	897	5,276	4,248	7,222	:
New Zealand.....	2	4	4	787	1,410	1,364	1,457	5,436	5,000	
Estimated total 6/.....		12	11	12	-	-	6,733	9,684	12,222	
Sub-total, (excl. U.S.S.R.)										
China and Eastern Europe 2/.....	5,253	6,140	6,290	-	-	-	4,603,230	5,220,000	5,490,000	
Estimated world total 6/.....	7,492	8,133	8,351	-	-	-	6,597,000	7,137,000	7,420,000	

1/ Year beginning July 1. For North temperate zone countries, harvests July through October of the year shown; for all other countries, harvests November and December of the year shown and January through June of the following year. 2/ Yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. 3/ Preliminary. 4/ Data not available. 5/ Less than a 5-year average. 6/ Totals include approximations for countries not listed and for countries listed where data are not available. 7/ Data for 1935-39 not comparable with subsequent years. Data for 1950 and 1951 are postwar areas. In the case of Germany, postwar data are for Western Germany only. In the case of China, 1935-39 data are for Free China only. In India and Pakistan, due to changes in the method of estimating acreage and production, postwar data are believed to be more accurate than prewar. 8/ Separate data not available for 1935-39. 9/ Includes Albania, Bulgaria, Czechoslovakia, Hungary, Poland and Romania.

Office of Foreign Agricultural Relations. Official estimates of foreign countries, reports from U.S. Foreign Service officers, results of Office research, and other information.

important producing countries and especially in the United States, China, Southern Rhodesia, and Canada. Decreases were recorded for Brazil, the Union of South Africa, India, Pakistan, and New Zealand.

Increased world demand for flue-cured leaf, used mostly in the manufacture of Virginia-type and United States blended cigarettes, has resulted in a progressive increase in output of this type of tobacco. Consumers in practically all countries are shifting from products containing dark and cigar tobacco to flue-cured and other light types used principally in cigarettes. Effective world demand for flue-cured leaf, especially United States flue-cured, would probably be substantially larger if it were not for restrictions by many countries on the use of foreign exchange for the import of tobacco.

In the case of Oriental or Turkish tobacco, substantial increases were reported for Yugoslavia, Hungary, Greece, and Italy, while slight decreases were reported for Turkey and Union of South African countries. The countries of South Africa have decreased Oriental type production in favor of flue-cured for which there has been a substantial increase in demand.

Production during 1951-52 of light air-cured types including Burley, which represents an important portion of the world production in many producing countries, is estimated above 1950-51. A substantial increase was noted in the United States. However, this was offset by minor decreases in some other countries. Production of dark types other than cigar leaf is expected to exceed the 1950-51 output. Cigar leaf production is estimated slightly below the 1950-51 outturn, attributable, for the most part, to smaller United States production.



FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FT 6-52

August 22, 1952

UNITED STATES TOBACCO EXPORT SITUATION

Exports of United States unmanufactured tobacco thus far during the current marketing year (July 1951-June 1952 for flue-cured, October 1951-September 1952 for all other types) have substantially exceeded exports for the complete 1950-51 marketing year. Larger flue-cured exports have primarily accounted for the increased exports of leaf during the current year. Indications are that Burley, Kentucky-Tennessee fire-cured, Maryland, One Sucker, and Cigar leaf exports may be lower than 1950-51. Little change is expected for Green River and Black Fat.

Combined leaf exports during the three months period, April-June 1952, totaled 72,699,000 pounds or 15 percent below the 85,315,000 pounds shipped during the corresponding 1951 period and 13 percent below the 89,132,000 pounds exported during January-March 1952. Exports for the first six months of the 1952 calendar year totaled 161,832,000 pounds or 4 percent below the 166,530,000 pounds shipped during the first half of the calendar year 1951. The decrease was due to smaller shipments during April-June 1952 period.

Larger shipments of flue-cured leaf to the United Kingdom during 1951-52 are primarily responsible for the increase in combined exports for the current marketing year. The larger shipments to the United Kingdom were for stock replenishments and do not reflect increased requirements for consumption. The increased exports to the United Kingdom during 1951-52 were larger than usual, however, they are expected to take less tobacco during 1952-53. Smaller takings will be due chiefly to the United Kingdom's dollar restrictions for tobacco purchases during this period. Improved economic conditions in some Western European and other importing countries may partially offset the expected decrease in the United Kingdom's takings for the 1952-53 marketing year.

Continental Europe, the most important outlet for United States tobacco exports during April-June 1952, took 43,646,000 pounds or 60 percent of the total. This compared with 54,302,000 pounds, which was 64 percent of the total, in the same 1951 period. Asia ranked second taking 17,510,000 pounds as compared with 12,899,000 pounds in the same 1951 quarter. Africa ranked third with 4,622,000 pounds; Australia and New Zealand combined ranked fourth with 2,579,000 pounds; the United Kingdom and Ireland, fifth, with 2,236,000 pounds; Latin America, sixth, with 1,848,000 pounds. All "other" countries took the remaining 258,000 pounds.

Exports by Types

Exports of flue-cured leaf during the 1951-52 marketing year totaled 444,167,000 pounds as compared with 377,156,000 pounds in 1950-51. The 1951-52 flue-cured exports were exceeded only by the postwar year 1946-47 when 480,586,000 pounds were exported. The United Kingdom took 215,523,000 pounds of flue-cured leaf during 1951-52. This corresponds with only 147,113,000 pounds in 1950-51. Although the United Kingdom and other importing countries have attempted to obtain flue-cured leaf from soft currency surplus producing areas, they have not been able to supply the consumer demand and consequently remain good markets for United States flue-cured leaf.

Burley exports during the first nine months of the 1951-52 marketing year (October 1951-June 1952) totaled 17,345,000 pounds, compared with 21,286,000 pounds during the corresponding 1950-51 period. Prewar annual (1934-35 through 1938-39) average Burley exports were only 10,900,000 pounds. The increased exports result from increased usings in blended cigarettes; however, the percentage used in foreign manufacture is still small as compared with United States manufacture. For this reason plus increased foreign cigarette manufacture further increases in Burley exports may be possible.

Exports of Kentucky-Tennessee fire-cured during the first nine months 1951-52 marketing year totaled only 18,603,000 pounds as compared with 25,313,000 pounds during the same 1950-51 period. This decrease resulted primarily from smaller shipments to Continental Europe. Exports of Virginia sun-cured during the same period were 154,000 pounds; over 99 percent of which was taken by Norway.

In addition to flue-cured, Burley, Kentucky-Tennessee fire-cured and Virginia sun-cured, the United States exports during the 1951-52 marketing year through June were as follows: Maryland 4,555,000 pounds, of which 3,183,000 pounds were taken by Switzerland; Green River 1,969,000 pounds; One Sucker 1,417,000 pounds; Black Fat 3,435,000 pounds; Cigar Leaf 4,338,000 pounds; Perique 49,000 pounds; and Stems and Scrap 2,355,000 pounds.

TOBACCO: (Unmanufactured): Exports from the United States by types, 1951-52, marketing year through June 1952 with comparisons 1/

(Export Weight)

Types	Marketing Years					
	Totals for Marketing Years			through June		
	Average	1934-35	1948-49	1949-50	1950-51	1950-51
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
	:	:	:	:	:	:
Flue-cured.....	313,865	337,247	388,668	377,156	377,156	444,167
Burley.....	10,900	36,519	35,711	26,150	21,236	17,345
Kentucky-Tennessee	:	:	:	:	:	:
Fire-cured.....	51,389	31,994	20,246	30,134	26,313	16,608
Virginia Fire-cured...	9,503	5,777	5,250	4,836	3,462	2,862
Virginia Sun-cured....	2/	2/	2/	2/	2/	134
Maryland.....	5,189	3,919	7,123	8,092	6,679	4,555
Green River.....	3,030	3,055	1,031	2,324	2,180	1,969
One Sucker.....	886	6,208	2,131	3,599	1,860	1,417
Black Fat.....	8,974	5,171	3,237	4,355	3,046	3,435
Cigar Leaf.....	1,380	20,688	9,706	6,213	4,148	4,338
Perique.....	129	32	98	38	17	49
Stems and Scrap.....	19,497	7,730	3,066	5,676	4,820	2,855

1/ Flue-cured marketing year July-June. All other types October-September. The data include stemmed and unstemmed leaf. The two kinds are combined as reported, i.e., stemmed leaf has not been converted to an unstemmed basis.

2/ Shipments of Virginia fire-cured and Virginia Sun-cured combined as Virginia Dark prior to January 1, 1952. Virginia Sun-cured shipments for October-December 1951 included in Virginia fire-cured total.

Compiled from official records of the Bureau of the Census, U. S. Department of Commerce.

TOBACCO (unmanufactured): Exports from the United States to designated regions, total and by types, April-June 1952 with comparisons ^{1/}

(Export weight)

Region	Flue-cured	Burley	Kentucky-Tenn.	Virginia	Virginia	Maryland	Green River
	1951	1952	1951	1952	1951	1952	1951
	pounds	pounds	pounds	pounds	pounds	pounds	pounds
United Kingdom & Ireland	8,669	1,437	0	4	773	565	114
Cont'l Europe	29,446	32,834	7,234	4,526	9,919	2,429	509
Africa	955	1,712	185	337	1,317	929	17
Asia	11,595	16,697	672	329	3	92	8
Australia & New Zealand	2,029	2,533	0	0	20	20	26
Latin America	1,049	848	260	713	102	158	0
All other	0	140	0	0	25	58	0
Total	53,743	56,201	8,351	5,209	12,159	4,251	704
One Sucker		Black Fat		Cigar Leaf		Perique	
United Kingdom & Ireland	0	1	0	1	2	0	0
Cont'l Europe	309	46	0	1,546	1,005	2	2
Africa	434	297	1,217	861	121	118	0
Asia	0	0	0	0	25	1	0
Australia & New Zealand	0	0	0	0	2	0	0
Latin America	16	30	12	11	27	30	1
All other	0	0	17	11	249	44	0
Total	759	374	1,246	883	1,971	1,200	31
				Stems and	Scrap		Total
							All Types
							:

^{1/} Data include stemmed and unstemmed leaf. The two kinds are combined as reported, i.e., stemmed leaf has not been converted to an unstemmed basis. ^{2/} Included with Virginia fire-cured. ^{3/} Less than 500 pounds.

Compiled from official records of the Bureau of the Census, U. S. Department of Commerce.



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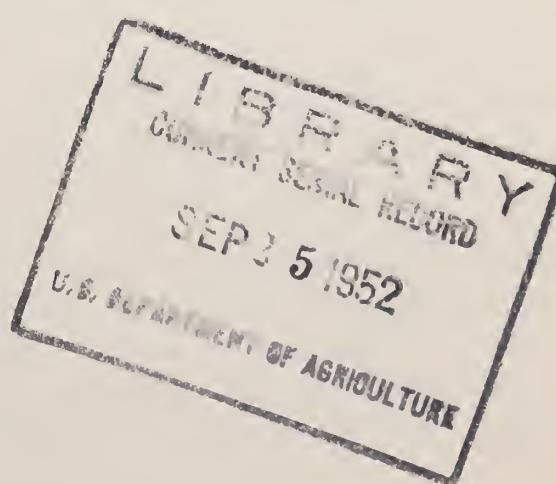
September 4, 1952

MARKETING SPECIALIST JOINS OFAR STAFF

The Office of Foreign Agricultural Relations announces the addition of Mr. George W. Thomas, Jr., marketing specialist, to the International Commodities Branch staff in the Tobacco and Tropical Products Division.

Mr. Thomas is familiar with marketing problems and trends of both foreign and domestic tobacco-producing areas. For the past 4 years he has been Chief of the tobacco branch, Food and Agriculture Division of the Mutual Security Agency (formerly ECA). In that capacity he visited the major Western European tobacco markets and assisted in developing their tobacco programs with trade and government officials. He also acquired experience with tobacco production and marketing problems in Turkey, Greece and Italy.

The new tobacco marketing specialist is a former flue-cured producer. He has also had experience with the Agricultural Adjustment Administration on tobacco contracts and loan programs from 1935 to 1943 after which time he worked for the Food Distribution Administration on tobacco programs and marketing systems until he entered the Navy in 1944.





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FT 8-52

September 19, 1952

FOREIGN MARKET NOTES--TOBACCO

Tobacco Situation in Western Germany 1/

By George W. Van Dyne
Tobacco Marketing Specialist

The outlook for Western Germany's tobacco industry appears brighter now than it has for several years. Employment is expanding, wages and living standards are higher, and the smoking population is increasing. Legislation favoring a reduction in the price of cigarettes and smoking tobacco appears likely by September-October, and the actual marketing of products at the reduced prices may begin in January or February 1953.

Production.

Western Germany's production of leaf tobacco from the 1951 crop is now reported to have been about 56.9 million pounds. It was produced by approximately 60,000 farmers on an area of 26,259 acres. The prewar (1934-38) harvest for all Germany averaged 74.9 million pounds, grown by about 70,186 farmers on an average of 31,644 acres. During 1951 Western Germany produced about one-third of the total leaf used by its manufacturers.

The bulk of the tobacco grown in Western Germany is a dark, heavy cigar type, which is air-cured and fermented. It is classified principally as cigar filler and binder leaf. Most of the remaining crop is a somewhat similar but lighter leaf, used chiefly for blending purposes in smoking mixtures. The seedlings are cultivated in January and February, transplanted during April and May, and harvested from September to November. Second-growth leaves are also harvested, but this practice is being discouraged. About 80 percent of Western Germany's tobacco is grown in the southern and southwestern part of the country in Wurttemberg-Baden, Rhineland-Palatinate, Baden, Bavaria, and Hesse; important quantities are also harvested in Lower Saxony. Minor quantities of rustica are grown in small plots, mainly in the Baden and Nurnberg districts. In addition to these types, bright flue-cured leaf is now produced

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco, conducted under the provision of the Agricultural Marketing Act. Mr. Van Dyne acknowledges the help given him by the staff at HICOG, Bonn and Bremen.

on a commercial scale, and attempts are being made to cultivate Burley and Kentucky dark-fired tobacco.

The Tobacco Research Institute at Forchheim, near Karlsruhe, has conducted successful experiments in the production of flue-cured leaf since shortly after the war. This very active Institute functions in the field of scientific and technical research in connection with various types of tobacco and distributes relative information and publications to growers and other interested parties. Furthermore, it played an important role in the formation and operation of several successful cooperative associations whose activities include the selection and distribution of tobacco seed to the growers, assistance in planting, harvesting, curing, re-drying, etc.

In 1948 eight cooperative associations with 60,000 members formed a cooperative group at Karlsruhe, the aims of which include improving the quality and increasing the production of better types of tobacco, especially flue-cured leaf. This group was instrumental in expanding the production of flue-cured type leaf in the southern part of the country around Forchheim, Duderstadt, Eisdorf, and Morsch. Recently small commercial quantities of flue-cured tobacco were produced in the northern part of the country in the states of Schleswig-Holstein, Bremen, and Hamburg, and also in Lower Saxony.

It is estimated that a total of 500,000 pounds of usable flue-cured tobacco was harvested in 1949, about 1,000,000 pounds in 1950, and slightly over 5,000,000 pounds in 1951. The leaf has good color, fair combustion and size, but is papery and lacking in flavor and aroma. Plans have been made to double the size of the flue-cured crop in 1952. It is believed that about 1,200 flue-curing barns will be available in time for the 1952 harvest.

Most of the 1951 flue-cured crop was purchased under contract from growers by manufacturers in Western Germany at the equivalent of 40 U.S. cents per pound. To date, manufacturers have used little of this leaf in cigarette blends; the bulk has been utilized in smoking mixtures. Manufacturers do not want to use this flue-cured leaf for cigarette purposes until the quality has been further improved. However, should imports of United States flue-cured tobacco not be obtained, manufacturers may be forced to use domestic flue-cured leaf or increased quantities of flue-cured tobacco from other sources. Average prices of Southern Rhodesian flue-cured tobacco from the 1950 and 1951 crops in Western Germany were the equivalent of 41.7 U.S. cents per pound and 24.0 U.S. cents per pound respectively, as compared with 44.5 U.S. cents per pound and 29.5 U.S. cents per pound for the same type from Northern Rhodesia's 1950 and 1951 crops. Indian flue-cured leaf from the 1951 crop has been offered to importers in Western Germany at prices, f.o.b. Madras, ranging from the equivalent of 17 to 47 U.S. cents per pound. Samples of flue-cured leaf have recently been received from Japan, Brazil, and Italy.

Tobacco Products

Western Germany's tobacco manufacturing industry is a free-trade enterprise comprised of three old-established and well-operated branches—the cigarette, cigar, and smoking tobacco branches.

During 1951, there were 37 cigarette factories in operation which employed about 9,000 people and produced 27.2 billion cigarettes. Total factory capacity with the present equipment is estimated at about 3.6 billion cigarettes per month. Most of the cigarettes are manufactured in large, modern, mechanized factories located in and around Hamburg, but one of the largest and most important is located in Bremen, and other important factories are operated at Kolin and Wiesbaden.

Domestic cigarettes sell for 1.19 U.S. cents to 3.57 U.S. cents per cigarette in packets of 5, 10, and 20 pieces. About 95 percent of the cigarettes manufactured in Western Germany are United States blended type. Over 93 percent of the trade in domestic cigarettes during the first quarter of 1952 was in cigarettes selling for the equivalent of 2.38 U.S. cents each, or 47.6 U.S. cents per pack of 20 pieces. Cigarettes selling at 2.856 to 3.57 U.S. cents per cigarette include attractively packaged brands somewhat more similar in appearance and quality to the popular cigarettes sold in the United States. These represented about 4 percent of the trade in domestic cigarettes during the same period. Straight oriental-type cigarette sales represented only about 2 percent. The remaining sales were principally straight Virginia and dark French-type cigarettes.

In 1951 the cigar industry operated 2,700 establishments, scattered throughout Western Germany, employed nearly 68,000 people and produced 3.9 billion pieces. Almost all cigars are manufactured by hand. Special interest and consideration from those in authority is given this branch of the tobacco industry because of the large number of people involved. Included in the classification of "cigars" are small cigars known as Stumpens and cigarillos, most brands of which have a greater tobacco content than cigarettes but sell in the same price bracket. However, this segment of the trade will probably decline if prices of cigarettes are reduced. The regular cigar business, which in number of units sold is now about equal to the combined sales of Stumpens and cigarillos, should remain steady at the present price level.

In 1951 the smoking tobacco branch of the industry, which includes the making of chewing tobacco and snuff, employed about 12,000 people in 496 establishments. The largest, most modern, mechanized smoking tobacco factories are located in Bremen where 60 percent of the 1951 output was produced. The total output of this branch of the industry in 1951 was 44,092,000 pounds—slightly below the prewar level. About 75 percent was fine-cut tobacco used chiefly for "roll your own" cigarettes, which are of great importance to the individual who cannot afford to buy machine-made cigarettes. With increased purchasing power, or in the event of a reduction in the price of cigarettes, a large percentage of these consumers would probably shift to machine-made cigarettes unless the price of fine-cut tobacco is reduced. Output of snuff and chewing tobacco in 1951 was only 1,119,937 pounds and 149,913 pounds respectively, which was well below prewar levels; the output of these products is expected to decline still further if cigarette consumption increases.

Total factory utilization of raw tobacco in 1951 was about 169,959,228 pounds, which was approximately 84 percent of prewar level. A breakdown by categories shows that 39.76 percent of the tobacco was used in manufactured cigarettes, 36.04 percent in cigars, 23.79 percent in smoking tobacco and 0.41 percent in chewing tobacco and snuff. This compares with the prewar (1935-39) average utilization of 36 percent in cigarettes, 37 percent in cigars, 25 percent in smoking tobacco, and 2 percent in chewing and snuff. Cigarettes have gone ahead at the expense of all other products, particularly those in the cigar classification. The increase in cigarette consumption would be greater if cigarettes were not so heavily taxed. In 1951, cigarettes carried 75 percent of the tax burden of the entire Western German tobacco manufacturing industry. Should tax relief be granted, which the trade confidentially expects this autumn, the trend towards increased cigarette consumption may be accelerated. In 1951, 36.09 percent of the leaf tobacco used originated in the United States, 30.22 percent was grown in Western Germany, 17.46 percent came from oriental-type tobacco producing countries,* 11.33 percent from Latin American (chiefly Brazil and Columbia), 2.13 percent from Indonesian, and 2.77 percent from other countries, principally Southern and Northern Rhodesia.

During 1951 Western Germany used the following proportions of United States tobacco in its products: cigarettes, 58.70 percent; smoking tobacco, chewing tobacco, and snuff combined, 47.23 percent; and cigars, 7.71 percent.

Stocks

Total stocks of leaf tobacco held in Western Germany on December 31, 1951 (latest figures available) were 152,683,982 pounds. This quantity included 46,472,968 pounds of tobacco grown in Western Germany, 46,267,940 pounds produced in the United States, 28,650,982 pounds* grown in oriental-type producing countries, and 11,585,173 pounds grown in Brazil. During 1951 61,351,813 pounds of United States leaf tobacco were used in manufacture. At this rate, stocks on hand at the end of December represented only a 9.48-month supply. A breakdown by United States types shows a 9.2-month supply of flue-cured, a 9.3-month supply of Burley, and a 6.7-month supply of cigar leaf.

Prices of Imported Tobacco

The following are average costs of leaf tobacco from the 1949, 1950, and 1951 crops produced in the countries named. Costs have been converted into United States dollars per pound, c.i.f. Bremen and Hamburg.

* 14,907,505 pounds came from Turkey, 12,467,013 pounds from Greece, 1,402,126 pounds from Yugoslavia, and 892,863 pounds from Bulgaria.

Source: Tobacco Trade, Bremen and Hamburg.

Exports

Germany's tobacco export trade in prewar years was reduced to negligible quantities principally because of high tariffs. The postwar situation has changed very little; exports of tobacco products are insignificant and exports of leaf very small. Exports of leaf tobacco, however, increased from 103,616 pounds in 1950 to 782,192 pounds in 1951. Denmark and the Saar were the most important outlets, the former taking 316,140 pounds and the latter 241,845 pounds in 1951. Belgium, Netherlands, Austria, and Switzerland in the order named, took the next largest quantities. It is difficult to evaluate prospects for this new trade in leaf but it is doubtful if it will develop greatly unless the leaf quality is improved since the price per pound is comparatively high. The 1951 invoice price was equivalent to 55 U.S. cents per pound.

Imports

Since the war imports of unmanufactured tobacco, as well as domestic production, manufacture, and consumption have increased rapidly and are now near the prewar level.

During the early postwar years Western Germany did not import any leaf tobacco because of the chaotic exchange situation and the generally unstable conditions in the country. The bulk of the supply of tobacco products came from stocks shipped to the Allied Armed Forces or through black market channels. The major part of these supplies were cigarettes that originated in the United States. Cigarettes were in such demand that they represented the principal medium of exchange until the currency reform and abolition of tobacco rationing came late in 1948. Shortly thereafter economic conditions began improving. Foreign exchange was made available, and imports of leaf tobacco were resumed. United States flue-cured type and Burley tobacco were in particular demand.

Total imports of unmanufactured tobacco reached 99.0 million pounds in 1950 and 101.9 million pounds in 1951. In both these years 51 percent of the imports came from the United States, which in prewar years supplied less than 10 percent. Imports of leaf from oriental-type producing countries, the chief suppliers before the war, have declined, principally because of the shift in consumer preference to products containing a high percentage of flue-cured and Burley tobacco. Imports from oriental-type producing countries fell from a prewar average of 47 percent of total imports to about 25 percent in 1951. Imports from Latin America dropped from 18 percent to 16 percent of the total, and imports from other countries, chiefly Indonesia, dropped from 28 percent to 8 percent. These declines may be attributed generally to the shift in consumer demand, but shortages in supplies available for import, particularly from Indonesia, were a contributing factor.

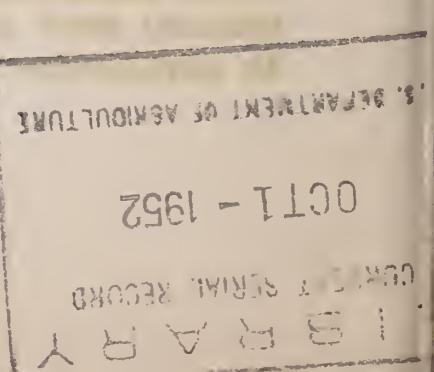
During the first half of 1952 total imports of leaf tobacco were about 1.7 million pounds higher than in the corresponding period of 1951; imports of United States leaf, however, were less than in the first half of 1951.

Outlook for Imports from the United States

The short-term outlook for imports of United States flue-cured, Burley, and cigar leaf is very good. Thereafter, price will probably be a particularly important factor to importers in Western Germany. Western German manufacturers and other importers of United States tobacco have used every possible means, including compensation deals and barter and switch transactions to obtain supplies of desired types of United States tobacco. However the German Government is still restricting the use of United States dollars and mediums through which United States tobacco may be obtained, and the premiums paid for exchange in connection with barter and switch transactions continue to be burdensome to the trade. During the calendar year 1953 imports of United States leaf will depend principally upon the final outcome of the 1952-53 proposed German import program. Another important factor will be the result of the recent efforts by the Greek and Turkish Governments to revive the market in Western Germany for oriental-type cigarettes.

The quality of domestic cigarettes of the United States blended type is now well below that of domestic straight oriental cigarettes sold under the world-famous names of Abdulla, Simon Arzt, and Kyriazi Freres. If the content of United States leaf in domestic United States blended type cigarettes is reduced below 55 percent, as is planned, the quality of these cigarettes will be even lower.

Stocks of oriental-type leaf have increased, and this may be a very critical period for United States leaf tobacco as stocks are low and prices high.





14 1.2 FOREIGN AGRICULTURE CIRCULAR

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OCT 24 1952
U.S. DEPARTMENT OF AGRICULTURE

FT 9-52

October 11, 1952

NORTH TEMPERATE ZONE TOBACCO PRODUCTION FORECAST LOWER

Tobacco production for 1952 in the North Temperate zone is expected to be 4 percent below 1951. This forecast is based on early crop indications and the final outturn may vary considerably when later estimates become available for several of the major producing countries.

The 1952 tobacco crop is now forecast at 5,422 million pounds compared with 5,635 million pounds in 1951. Decreased production in North America and the Southeastern part of Europe accounts for most of the decline in 1952 prospects. This decrease also in part is attributable to drought last summer, but it is expected to be partly offset by slight increases in the Asiatic and North African countries.

NORTH AMERICA

The United States crop, including all types, was forecast as of September 1 at 2,210 million pounds compared with last season's output of 2,328 million pounds. This decrease is a result of the dry weather which occurred in practically all the major producing areas during the growing season.

The 1952 flue-cured crop is forecast at 1,380 million pounds compared with 1,452 million pounds in 1951. Burley production for 1952, forecast at 606 million pounds, is 10 million less than in 1951. Maryland tobacco output of about 38.0 million pounds is also below the 41.6 million harvested in 1951. Fire-cured output, placed at 49.7 million is sharply below last year's crop of 59.5 million, while cigar leaf is forecast at only 108.4 million pounds compared with 126.6 million pounds in 1951.

Forecast for the United States flue-cured production as of September 1 places this season's output at about 5 percent below the 1951 output. The quality of the 1952 leaf is reportedly lower than average due to the dry weather during some of the growing season.

No official estimates have been received for Canada's 1952 flue-cured tobacco crop; however, a substantial decrease is expected as the total acreage planted to tobacco this year was about 25 percent below 1951. Reports indicate that this year's tobacco crop will be of better quality than the 1951 harvest.

EUROPE

The total 1952 production in Europe, excluding the Soviet Union, is estimated at about 780.0 million pounds as compared with 860.0 million pounds in 1951. The smaller output is primarily due to the lack of rain during the growing season in the Southeastern European area. The production in the Western European countries is forecast at approximately the same level as last year. It has been reported that the quality of the crop in Germany this year is below average.

SOVIET UNION

Authentic information on tobacco production in the Soviet Union has not been available. However, unofficial reports indicate this year's crop to be about the same as 1951 but still 14 percent below the 525.0 million pounds pre-war average. The quality of the leaf will probably be below average as a result of unfavorable weather conditions.

ASIA

Fragmentary information on this year's crop in China indicates an output comparable to 1951 but still below the 1,593 million pounds harvested in 1948. Increases were reported for Japan, Turkey, Syria, Iraq and Iran. Total Asiatic production for 1952 is placed at 1,820 million pounds as compared with 1,800 million pounds in 1951.

AFRICA

The 1952 tobacco production in the North Temperate zone of Africa is expected to be higher than 1951. The combined production for Algeria, Morocco and Tunisia is forecast at about 47.0 million pounds compared with only 42.5 million pounds in 1951.

TOBACCO: acreage, yield per acre, and production in specified north temperate zone countries, averages 1935-39, 1945-49, annual 1951 and 1952

Continent and Country	Acreage				Yield per acre 1/				Production				
	Average		1951-49		1952 2/		1945-49		1951-39		1945-49		
	1,000 acres	acres	1,000 acres	acres	1,000 pounds	pounds	1,000 pounds	pounds	1,000 pounds	pounds	1,000 pounds	pounds	
<u>NORTH AMERICA:</u>													
Canada	69	110	119	89	1,103	1,293	1,140	1,265	76,556	121,373	153,792	11,477	
United States	1,647	1,765	1,781	1,790	887	1,176	1,307	1,460	1,460,054	2,075,960	2,328,226	111,240	
Estimated total 3/	1,716	1,875	1,900	1,879	-	-	-	-	1,536,610	2,197,333	2,482,018	115,000	
<u>EUROPE:</u>													
Belgium	6	7	5	5	2,500	1,786	2,150	2,272	16,431	12,499	12,125	11,477	
France	44	63	68	71	1,676	1,486	1,628	1,622	79,995	93,614	56,900	56,900	
Germany 4/	33	20	27	29	2,254	1,610	2,118	1,953	74,355	32,208	137,135	137,135	
Greece 4/	226	172	236	190	589	471	581	522	132,819	81,095	179,674	179,674	
Italy 4/	81	5/	133	142	140	1,173	5/ 1,265	1,262	95,511	5/ 147,235	44,092	44,092	
Spain	-	23	37	-	-	1,265	1,190	-	17,322	29,093	-	-	
Sweden	1	1	1	1	-	1,735	1,000	1,560	-	1,061	1,036	655	655
Switzerland	1	3	2	2	1,571	1,810	2,141	2,141	2,276	5,431	5,291	5,291	
Yugoslavia 4/	39	70	77	89	969	889	796	-	37,410	62,241	61,297	61,297	
Total countries shown	451	492	595	526	-	-	-	-	457,180	464,452	608,421	288,523	
Other Europe 6/	249	338	275	324	-	-	-	-	217,820	185,548	251,579	491,477	
Estimated total 3/	680	830	870	850	-	-	-	-	675,000	650,000	860,000	780,000	
U.S.S.R.	5/	490	-	-	-	5/ 1,129	-	-	-	525,000	-	-	-
<u>ASIA:</u>													
Iran	32	38	39	-	1,096	1,000	681	-	34,542	38,020	26,764	26,764	
Iraq	5/	11	11	10	15 5/	752	1,207	674	719 5/	13,275	9,000	11,023	
Lebanon 7/	5/	13	5/	6	7 5/	(699	5/ 624	719	-	(8,825	3,124	4,332	4,332
Syria 7/	5/	14	19	20	20	603	800	-	5/	5/	8,444	15,374	15,374
Turkey	194	290	300	315	661	660	603	620	128,505	191,488	180,777	195,264	
China 4/	1,228	1,320	-	-	1,021	998	-	-	1,254,539	1,317,065	-	-	
Japan	92	95	133	132	1,621	1,394	1,584	1,627	148,680	132,400	209,966	216,194	
Korea 4/	46	39	-	-	1,252	1,053	-	-	57,504	41,079	-	-	
Estimated total 3/	1,675	2,124	2,015	2,040	-	-	-	-	1,700,000	1,850,000	1,800,000	1,820,000	
<u>AFRICA:</u>													
Algeria	56	59	76	-	691	614	542	-	38,667	36,209	40,968	44,092	
Tunisia	1	1	2	-	1,196	1,700	617	-	1,202	1,784	1,268	-	
Estimated total 3/	58	62	78	80	-	-	-	-	40,600	38,000	42,500	47,000	
Estimated north temperate zone total 3/	4,619	5,411	5,383	5,369	-	-	-	-	4,477,210	5,215,350	5,634,525	5,422,450	

1/ Some yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. 2/ Preliminary.

3/ Totals include approximations for countries not listed where data are not available. 4/ Data for 1935-39 not comparable with subsequent years. Data for 1945-49, 1951, and 1952 are for postwar areas. In the case of Germany, data for 1945-49, 1951 and 1952 are for Western Germany only. For Korea, postwar data are for South Korea only. In the case of China, postwar data are for all China except Manchuria; 1935-39 data are for Free China only.

5/ Less than a 5-year average. 6/ Includes data for Albania, Bulgaria, Czechoslovakia, Poland, Rumania, and Hungary. 7/ Separate data for Syria and Lebanon not available for 1935-39.

Office of Foreign Agricultural Relations. Official estimates of foreign countries, reports from U. S. Foreign Service officers, results of office research, and other information.



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UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

U. S. DEPARTMENT OF AGRICULTURE

FT 10-52

October 30, 1952

SWEDEN REDUCES THE PRICE OF AMERICAN CIGARETTES AS NEW TOBACCO PRODUCTS TAX LAWS TAKE EFFECT

The price of popular brands of American cigarettes in Sweden was reduced 8 percent per package of 20 cigarettes September 1, 1952. This price decrease resulted from adjustments made in taxes levied on tobacco products. By reducing the importance of the Ad Valorem tax and increasing the importance of the piece-rate tax, the tax load was increased on cheaper brands with a net effect of an over-all 6 percent increase in the retail price of tobacco products in Sweden.

The price of American cigarettes was reduced from 62.8 U.S. cents to 57.9 U.S. cents. The retail price of Robin Hood and Boy, two of the most popular domestic brands, increased from 38.6 U.S. cents to 42.5 U.S. cents, per package of 20; Bill and Boston, two other popular domestic brands, remained at 46.4 U.S. cents per package; Carmencita, another domestic brand, increased from 34.8 U.S. cents to 40.6 U.S. cents per package of 20. Prices of almost every other tobacco product were also increased (See table 1).

An important effect of the new tax structure is that an increase in manufacturing costs now influences the retail price much less than was the case under the old tax regulations. As the manufacturing costs increase, including profit to the Monopoly, of an average priced cigarette, a 10 percent increase in manufacturing costs now will result in only about 3.5 percent increase in the retail price. This will tend to make tobacco products cheaper than other commodities in case of a rise in prices and also should favor consumption of American cigarettes.

The prevailing rates for value and piece taxes for specified groups of manufactured tobacco products both domestic and imported are set forth in table 2. — By Claude E. Dobbins, based on Foreign Service Reports.

Table 1.- Tobacco Products: Retail price of manufactured tobacco products by specified brands in Sweden

Product	Unit	Old Retail Price 1/	New Retail Price 2/
		.U.S. Cents	.U.S. Cents
<u>Cigarettes</u>			
U.S. Brands (Popular)	Pack of 20	62.8	57.9
Robinhood, Boy	" " "	38.6	42.5
Bill, Boston	" " "	46.4	46.4
Carmencita	" " "	34.8	40.6
<u>Cigars</u>			
Bellman	Piece	8.7	9.1
Flor de Brazil	"	10.6	11.2
Ornen	"	13.5	15.5
Bueno Gusto Extra	"	38.7	38.7
<u>Cigarillos</u>			
Pepitas	Piece	3.9	4.1
Matanzas	"	6.2	7.0
Perfect	"	9.3	9.3
<u>Smoking Tobacco</u>			
Rikshag 1	50 grams	48.3	59.9
Viron-blandning	"	72.5	72.5
Kungs blandning	"	116.0	101.5
<u>Snuff</u>			
General Snus	50 grams	12.2	13.7
Karkskrona Snus	"	13.0	14.5

1/ Retail prices from January 1, 1951, through August 31, 1952.

2/ Retail price beginning September 1, 1952.

Compiled from Foreign Service Reports.

Table 2.— Tobacco products: Sweden's new tax rates for tobacco products effective July 1, 1952

Product	Domestic Brands			Imported Brands		
	Weight per piece	Value Tax percent of retail price	Price per piece	Tax per pound	Value Tax percent of retail price	Price per pound
Cigars, Group I	Up to 5.0	40	\$ 0.0093	—	40	\$ 0.0251
Cigars, Group II	Above 5.0	40	0.0116	—	40	0.0309
Cigarillos, Group I	Up to 1.7	40	0.0085	—	40	0.0135
Cigarillos, Group II	1.7 to 3.3	40	0.0124	—	40	0.0193
Cigarettes, Group I	Up to 0.75	40	0.0018	—	40	0.0068
Cigarettes, Group II	Above 0.75	40	0.0078	—	40	0.0102
Smoking tobacco	—	40	—	40	—	2.7178
Chewing tobacco	—	40	—	40	—	0.6137
Snuff	—	40	—	40	—	0.4384

Compiled from Foreign Service Reports.

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FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
NOV 14 WASHINGTON, D.C.

U. S. DEPARTMENT OF AGRICULTURE

FT 11-52

October 31, 1952

UNITED STATES EXPORTS OF MANUFACTURED TOBACCO PRODUCTS

The value of United States exports of tobacco products during 1951 (\$56.7 million) was more than 5 times greater than the prewar (1934-38) average value of \$10.8 million. However, the 1951 total is substantially below the immediate postwar years. During the first 6 months of 1952, exports of tobacco products totaled \$27.9 million, or at an annual rate of slightly less than the 1951 total. Comparison of export data during and since World War II indicate that a fairly stable market has been established, valued at about \$50 million annually, which should continue unless economic conditions in the importing countries should change drastically. Cigarettes continue to be the main export product, accounting for 94 percent by value of the total exports in 1951 compared to 84 percent of value in the prewar period.

Comparison of the Exports of Manufactured Tobacco Products

Product	1934-38			1951			January-June 1952		
	Quan-	Value	Percent	Quan-	Value	Percent	Quan-	Value	Percent
	tity	Total	of	tity	Total	of	tity	Total	of
Cigarettes									
(1,000 pieces)	4,774	9,058	83.9	16,808	53,436	94.2	7,773	26,001	93.1
Cigars and chewing roots (1,000 pieces)	8,201	435	4.0	3,402	194	0.3	1,300	69	0.3
Smoking tobacco (1,000 pounds)	967	601	5.6	2,553	2,019	3.6	1,289	1,063	3.8
Chewing tobacco & other (1,000 pounds)	1,787	708	6.5	1,374	1,070	1.9	1,003	784	2.8
Total		10,802	100.00		56,719	100.0		27,917	100.0

Cigarettes

In 1951, cigarette exports of 16.8 billion pieces valued at \$53.4 million have shown a considerable gain over the prewar (1934-38) average of 4.8 billion pieces valued at \$9.1 million. The 1951 exports of 16.8 billion pieces, however, were considerably below the 1946 exports of 24.3 billion; the 1947 exports of 22.4 billion, and the 1948 exports of 25.2 billion. The rate of the 1952 exports, based on the first 6 months, indicate that the true export demand for cigarettes is leveling off at about 16 billion pieces. The drastic drop from the 1946-48 level is primarily attributed to the shift of the Philippine Islands from a market for manufactured products to a market for leaf tobacco. During the 4-year period, 1946-49, the Philippine Islands imported about 9 billion cigarettes annually compared to 1.2 billion pieces in 1951 with the rate of exports in the first 6 months of 1952 about the same as 1951. There have been some reductions in the export of cigarettes to Hong Kong and the other South Eastern Asia areas. Other areas of the world show a rising trend in total cigarettes imported from the United States.

Cigars and Cheroots

During the prewar years of 1934-38, cigars and cheroots exports were 4 percent by value of the total tobacco products exported. In 1951, they were only 0.3 percent of the total value of exports of products. This decrease is attributed to the decrease in cigar and cheroots imports into the United Kingdom and Italy from the United States. There has been some increase in 1951 over the prewar average in the shipments of cigars and cheroots to Africa. Based upon the first 6 months of 1952, it appears that the total exports of cigars and cheroots in 1952 will be slightly less than those of 1951. However, the 4-year average (1949-52) indicate an existing market of about 3 million pieces a year.

Smoking Tobacco

While the percentage of smoking tobacco by value of the total manufactured products exported in 1951 is lower than the prewar average, the total exports of 2,553,000 pounds with a value of \$2,019,000 is more than 3 times by value the prewar average of 967,000 pounds valued at \$601,000. The 1951 exports of smoking tobacco were the highest of any year during the postwar period except 1946, with the first 6 months of 1952 exports at a rate a few pounds higher than in 1951.

Chewing Tobacco and Other

While the average for the period 1946 through 1951 in volume is approximately the same as prewar (1934-38) the average 1950 and 1951 exports have been at a considerably less volume than the prewar. The first 6 months of 1952 indicate some increase over 1951 and 1950. It is anticipated that the export market for chewing tobacco will remain fairly constant to the prewar demand. -- By George W. Thomas.

Continent and Country	Average 1934-36	1939	1940	1941	1942	1943	1944	1945	1946	1947	1948	1949	1950	1951	Jan.-June 1952	
	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	
NORTH AMERICA																
Iceland	106	4,090	3,006	1,510	32,370	53,820	78,550	112,200	133,000	131,560	130,300	103,051	1950	1951	1952	
Canada	11,865	15,510	31,469	3,311	69,005	223,161	13,759	35,170	80,697	58,339	128,191	119,026	278,596	1,000 pieces	1,000 pieces	
Newfoundland and Labrador	6,166	13,071	12,071	71,644	211,538	151,012	136,188	128,191	132,039	125,400	125,400	119,561	158,688	1,000 pieces	1,000 pieces	
Nicaragua and St. Pierre	6,119	5,650	5,335	7,222	16,582	19,882	12,158	6,150	7,730	4,730	8,930	5,000	1,000 pieces	1,000 pieces	1,000 pieces	
Mexico	30,776	36,234	46,488	18,480	185,600	181,623	189,999	202,791	399,553	285,481	285,481	285,481	264,252	1,000 pieces	1,000 pieces	
Costa Rica	28,528	52,589	52,589	58,166	28,958	43,741	41,080	41,080	49,250	50,771	50,771	50,771	50,759	1,000 pieces	1,000 pieces	
Panama Republic	(368,844)	216,350	267,137	514,066	585,710	318,860	311,785	311,785	317,766	255,970	255,970	255,970	195,011	361,085	1,000 pieces	
Panama Canal Zone	29,304	36,122	17,220	63,180	82,044	19,571	37,116	50,991	209,710	209,710	209,710	209,710	209,710	209,520	1,000 pieces	
Bermuda	16,834	61,986	75,334	101,114	91,368	96,723	122,730	135,162	219,124	219,124	219,124	219,124	61,766	66,150	1,000 pieces	
Cuba	19,117	30,375	30,660	28,880	18,875	35,930	37,865	37,865	89,101	118,708	118,708	118,708	96,520	278,190	1,000 pieces	
Haiti	105,226	201,180	249,339	275,172	241,937	344,104	572,325	759,993	759,993	1,221,102	1,221,102	1,221,102	1,221,102	67,950	1,000 pieces	
Guatamala (North. Y. Indies)														63,880	1,000 pieces	
Netherlands Antilles														63,880	1,000 pieces	
Other	42,029	49,050	58,404	138,219	281,893	92,229	180,617	176,163	133,399	120,474	120,474	120,474	967,894	769,190	1,000 pieces	
Total North America	715,704	981,157	1,197,450	1,668,734	2,086,922	3,508,220	1,380,198	1,868,231	2,741,601	2,621,687	3,010,909	3,010,909	3,010,909	77,423	121,490	1,000 pieces
SOUTH AMERICA																
Colombia	90,778	180,341	161,405	160,849	139,362	166,916	200,737	275,111	582,709	669,801	480,356	67,227	238,777	165,815	105,339	
Venezuela	38,688	64,880	123,865	110,431	132,895	21,186	19,060	81,355	355,068	582,709	702,287	879,148	1,051,602	1,699,959	861,388	
Ecuador	6,698	18,561	12,977	21,117	21,186	10,780	10,780	10,780	166,008	166,008	115,180	115,180	115,180	112,554	115,260	
Peru	10,154	17,805	26,511	35,205	43,815	55,415	55,415	55,415	58,973	58,973	130,100	8,000	60,000	57,070	26,750	
Uruguay	7,804	9,835	13,482	21,633	39,324	29,560	68,720	106,285	151,905	151,905	131,160	135,178	137,027	105,556	1,000 pieces	
Argentina	63,642	63,642	62,211	12,310	106,765	65,425	51,310	16,072	183,662	60,850	60,850	60,850	60,850	6,810	1,000 pieces	
Chile	8,827	7,776	11,201	20,798	12,221	15,801	73,222	16,072	28,508	28,508	22,120	20,233	30,186	1,000 pieces	1,000 pieces	
Total South America	226,692	307,146	356,005	107,937	553,237	534,704	752,441	1,000,197	1,417,958	1,417,958	1,633,217	1,633,217	1,633,217	1,633,217	1,234,154	
EUROPE																
Sweden	79,755	32,101	26,070	4,884	119,237	181,925	1,219,692	1,309,610	1,309,610	1,309,610	1,309,610	1,309,610	358,925	597,256	304,880	
France	277,962	277,224	51,451	6,042	11,065	159,911	166,322	171,886	27,113	27,113	11,129	11,129	11,129	11,129	1,000 pieces	
United Kingdom	98,754	85,642	95,625	110	110	110	110	110	110	110	110	110	110	110	110	
Netherlands	127,916	322,758	186	186	186	186	186	186	186	186	186	186	186	186	186	
Ireland	63,461	12,350	64,518	12,350	33,378	11,378	22,102	16,166	18,195	16,760	351,292	86,510	86,510	86,510	86,510	
Belgium	15,735	23,136	23,136	75,412	116,855	78,162	110,117	112,665	175,120	78,250	9,320	3,000	3,000	3,000	1,000 pieces	
Switzerland	980	15,595	15,595	21,900	38,041	40,972	40,972	40,972	51,200	51,200	22,250	22,250	22,250	22,250	1,000 pieces	
Spain	1,686	9,128	11,113	11,113	116,954	119,018	100	20	1,163	1,163	1,163	1,163	1,163	1,163	1,000 pieces	
Portugal	35,500	59,956	44,179	18,118	5,822	162,159	90,634	162,159	198,191	198,191	198,191	198,191	198,191	198,191	1,000 pieces	
Italy	112,692	114,129	118,618	32,618	26,359	5,294	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,000 pieces	
Other	889,961	1,210,169	327,987	260,197	118,612	913,084	2,329,624	1,367,479	3,867,271	4,345,373	4,345,373	4,345,373	4,345,373	4,345,373	4,345,373	
Total Europe	2,732,240	3,999,973	4,567,686	4,907,852	8,394	16,477	1,521,736	15,313,240	12,270,275	13,198,075	9,069,174	4,215,607	4,215,607	4,215,607	4,215,607	
ASIA																
Iraq	648	1,818	2,790	5,180	3,200	3,000	159,180	132,723	5,264	530	2,020	5,880	26,216	20,660	7,290	
Palestine and Trans-Jordan	2,377	5,610	26,635	20,125	14,190	-	5,100	11,110	31,680	53,794	21,221	1,880	1,880	1,880	1,000 pieces	
French Indochina	15,814	19,719	21,292	17,698	4,573,039	4,573,039	1,475,852	895,668	334,766	669,445	9,180,719	11,569,594	11,569,594	11,569,594	11,569,594	
Netherlands Indies	2,543,597	3,700,798	87,233	87,879	96,713	199,018	100	20	1,163	1,163	1,163	1,163	1,163	1,163	1,000 pieces	
Philippines Republic	82,159	63,035	63,035	63,201	7,400	-	-	-	1,823,333	86,940	1,443,775	1,443,775	1,443,775	1,443,775	1,443,775	
China	22,159	22,159	22,159	10,020	8,594	7,400	162,159	162,159	162,159	162,159	162,159	162,159	162,159	162,159	1,000 pieces	
Hong Kong	2,554	10,020	80,412	80,412	32,618	26,359	5,294	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,26,817	1,000 pieces	
British Malaya	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	45,644	
Other	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
Total Asia	2,732,240	3,999,973	4,567,686	4,907,852	8,394	16,477	12,623	48,084	48,375	660	4,660	1,000	100,000	100,000	1,000 pieces	
OCEANIA																
Australia	19,011	29,073	3,790	1,458	1,458	1,458	4,890	1,474	4,890	158,948	1,110	1,110	1,110	1,110	1,000 pieces	
New Zealand	17,589	36,450	8,013	13,651	19,777	19,777	6,355	1,230	1,230	78,610	68,190	68,190	68,190	68,190	1,000 pieces	
French Pacific Islands	23,129	-	-	-	-	-	45,520	33,412	33,412	-	-	-	-	-	1,000 pieces	
Other	730	655	1,075	1,110	570	860	3,950	3,950	3,950	660	4,660	4,660	4,660	4,660	1,000 pieces	
Total Oceania	60,759	82,193	13,858	16,477	22,623	18,084	4,375	42,867	238,943	71,000	100,000	100,000	100,000	100,000	1,000 pieces	
AFRICA																
Algeria	{ 15,120	4,539	2,532	-	-	4,630	4,630	4,630	4,630	4,630	3,200	3,200	3,200	3,200	3,200	
Tunisia	37,572	100	2,110	2,040	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	
Canary Islands	-	-	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	1,638	
Libya	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Union of South Africa	33,847	97,097	63,089	107,727	69,182	47,271	30,170	107,750	107,750	107,750	107,750	107,750	107,750	107,750	107,750	
Egypt	33,447	97,097	63,089	107,727	69,182	47,271	30,170	107,750	107,750	107,750	107,750	107,750	107,750	107,750	107,750	
Belgian Congo	522	1,606	2,472	2,397	13,401	12,026	12,026	12,026	12,026	12,026	12,026	12,026	12,026	12,026	12,026	
Tangiers	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Other	118,067	375,966	113,890	207,982	110,754	97,813	1,736,130	871,239	871,239	871,239	871,239	871,239	871,239	871,239	871,239	
Total Africa	1,773,666	6,760,639	6,516,876	7,569,109	2,910,542	1,409,014	7,551,676	6,892,125	21,329,629	22,329,674	22,329,674	22,329,674				

1/	Includes	Poland and Danzig	811,971.
	=	Czechoslovakia	565,673.
2/	=	Czechoslovakia	788,765.
	=	Bulgaria	579,750.
3/	=	Czechoslovakia	551,660.
		Hungary	285,800.

Comments in the *Review of Economic and Social Change* 1984-85

United States exports of cigars and cheroots, chewing and smoking tobacco, average 1934-38, annual 1939 through 1951, and January-June 1952

Continent and Country	Average 1934-38	1939	1940	1941	1942	1943	1944	1945	1946	1947	1948	1949	1950	1951	Jan.-June 1952
	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces	1,000 pieces
<u>Cigars and Cheroots.</u>															
<u>NORTH AMERICA</u>															
Greenland	-	-	925	937	1,589	413	16	6	169	55	-	-	-	-	-
Iceland	3	53	96	196	1,591	1,876	175	-	150	50	-	-	-	-	-
Panama Republic	1,111	351	764	1,945	7,624	288	138	353	380	692	639	508	535	290	258
Canal Zone	-	1,258	1,785	2,813	1,116	98	282	90	438	1,377	1,212	1,033	630	664	426
Bermuda	25	68	-	766	1,092	221	31	19	-	1,212	214	137	-	3	-
Other Countries	44	587	920	2,166	4,004	804	119	193	508	980	573	269	204	200	81
Total North America	1,583	2,320	4,490	8,853	17,016	3,700	791	661	1,645	4,366	2,668	1,947	1,369	1,157	765
<u>SOUTH AMERICA</u>															
Total South America	169	50	59	361	440	81	128	28	46	386	116	41	38	63	47
<u>EUROPE</u>															
Germany	182	69	-	-	-	-	-	-	811	14	6,203	-	1	22	-
United Kingdom	2,176	1,554	1	-	26	2	13	1/	43	53	3	61	2	13	-
Spain	1	-	2	2,680	-	-	-	-	-	-	-	2	-	-	1
Italy	2,514	-	-	-	-	-	15	5	29	6	14	3	2	2	-
Other Countries	367	471	87	385	343	112	210	7	141	2/1,145	646	124	153	138	16
Total Europe	5,240	2,094	90	3,065	369	114	238	12	424	1,218	6,856	188	160	175	17
<u>ASIA</u>															
Total Asia	219	190	160	125	1	58	18	409	470	626	3/2,857	719	459	755	51
<u>OCEANIA</u>															
Total Oceania	321	210	1	-	10	17	14	168	13	21	7	1/	12	-	5
<u>AFRICA</u>															
Egypt	67	88	60	96	64	-	153	35	30	12	8	33	35	32	8
Union of South Africa	553	428	478	1,498	325	-	-	34	604	848	690	10	301	1,079	350
Other Countries	49	63	17	253	427	79	53	167	62	97	191	80	77	141	57
Total Africa	669	579	555	1,847	816	79	206	236	696	957	889	123	413	1,252	415
Total Quantity	8,201	5,143	5,355	14,251	18,652	4,049	1,395	1,514	3,294	7,574	13,403	3,018	2,161	3,402	1,300
Total Value, 1,000 dollars	435	330	168	358	510	122	55	89	172	282	1,096	164	136	194	69
<u>Chewing, Plug, and Other Tobacco</u>															
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Newfoundland & Labrador	201	204	160	170	227	122	160	130	137	108	122	80	35	29	14
Panama	141	147	128	141	175	121	69	122	161	181	152	122	162	139	59
United Kingdom	147	101	119	87	75	57	70	37	70	47	46	71	23	22	14
Philippine Islands	609	778	725	644	-	-	-	2	304	1,200	1,502	1,123	215	538	459
Australia	516	621	473	375	185	114	683	529	226	229	514	827	976	504	379
Other Countries	173	119	95	111	272	182	121	173	274	102	1,185	162	99	142	78
Total Quantity	1,787	1,970	1,700	1,528	934	596	1,103	993	1,172	1,867	3,521	2,385	1,510	1,374	1,003
Total Value, 1,000 dollars	708	822	717	592	353	238	706	669	649	1,069	1,888	1,507	1,156	1,070	784
<u>Smoking Tobacco</u>															
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
U.S.S.R.	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Canada	49	61	79	11	34	26	101	303	108	126	131	217	(269	(257	(
Newfoundland & Labrador	83	106	123	160	220	182	88	76	84	75	76	(((116
Argentina	268	97	154	209	125	344	16	833	1,070	738	391	130	44	165	-
United Kingdom	102	132	1	216	363	2	17	17	18	23	13	11	11	21	10
Philippine Islands	64	76	68	94	-	-	-	9	127	157	176	130	21	303	226
Other Countries	401	375	345	522	472	680	369	1,068	2,854	1,231	1,334	1,607	1,664	1,807	937
Total Quantity	967	847	770	1,212	1,214	1,234	591	2,306	6,118	2,359	2,122	2,171	2,009	2,553	1,289
Total Value, 1,000 dollars	601	558	461	648	569	1,220	429	1,573	3,234	1,781	1,623	1,791	1,716	2,019	1,063

1/ Less than 500 pounds.

2/ Denmark 850.

2/ Japan 1789.

2/ Smuff including 1945 on.

2/ Includes smoking tobacco in packages, smoking tobacco in bulk, and especially prepared cigarette tobacco.





FOREIGN AGRICULTURE CIRCULAR

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UNITED STATES DEPARTMENT OF AGRICULTURE
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November 21, 1952

FOREIGN MARKET NOTES--TOBACCO

Tobacco Situation in Greece 1/

By George W. Van Dyne
Marketing Specialist

The harvesting of the tobacco crop in Greece was not completed on October 1 but on the basis of information received from the Hellenic Tobacco Boards at Athens and Salonica and from various top level officials in the trade, the total crop is estimated at 93,034,120 pounds, green weight. It is reported to be made up of about 55 to 60 percent American grades, 25 to 30 percent European, 7 to 10 percent Kappas, and 5 to 8 percent waste. The decrease of about 30 percent in poundage over last year was principally due to abnormal growing conditions (destruction of seedlings by hail and the prolonged drought) during the transplanting period.

The acreage to be planted in tobacco for the 1953 crop is expected to be about 247,100 acres, which is about the same as the area cultivated in 1950 and an increase over the 188,560 acres planted in 1952. This planned increase is due chiefly to recent heavy buying by manufacturers in Western Germany, increased shipments to East Germany, Scandinavia, potential barter arrangements with Russia, and generally favorable prospects for the next year or two.

Average prices to growers for the 1952 tobacco are expected to be at least 10 to 15 percent higher than for the 1951 crop tobacco because the quality is much better, the crop much smaller, the export demand substantially greater, and stocks, particularly of better grades, are relatively short.

Total stocks of unmanufactured leaf tobacco available for export on October 1, 1952, were estimated by the trade at 152,889,010 pounds. This estimate does not include the 1952 crop, the harvesting of which had not been

1/ Part of a continuing study of foreign market outlets and competition with United States tobacco, conducted under the provisions of the Agricultural Marketing Act.

completed as of October 1, nor domestic manufacturers' stocks, estimated at about 17,636,800 pounds. Members of the trade feel that orders in hand and probable orders would bring the stocks of 1950 crop and older tobaccos down to about 22,046,000 pounds. Furthermore, they believe that by the end of 1952 stocks of the 1951 crop will have been disposed of and that by the end of 1953 a sellers' market will have developed and the 1952 crop will have been sold.

Exports of leaf tobacco from Greece, which totaled 69,380,967 pounds for the entire year 1951 and averaged 98,748,443 pounds per year for the prewar (1935-39) period are estimated by the Ministry of Commerce at Athens at 49,846,006 pounds for the first half of 1952. The trade feels that the outlook for a continued increase in exports is favorable. Average prices for exports from the 1952 crop are expected to be 10 to 15 percent above the 1951 average, and the whole picture looks better than it did a year ago.



FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
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U. S. DEPARTMENT OF AGRICULTURE

FT 13-52

November 25, 1952

MEXICO'S TOBACCO PRODUCTION, IMPORTS, PRICES AND TAXES HIGHER; CONSUMPTION AND MANUFACTURING LOWER

The country's 1952-53 tobacco production is tentatively forecast at about 9 percent above 1951-52, according to P. D. Miner, American Embassy, Mexico. Imports of leaf tobacco during January-August 1952 were 17 percent above the total during the 1951 calendar year. Prices of leaf tobacco are 22 percent higher than in 1951. Consumption of leaf tobacco for the first 8 months of 1952 is 4 percent below the comparable 1951 period. The manufacture of cigarettes during January-August 1952 were slightly less than during the comparable 1951 period.

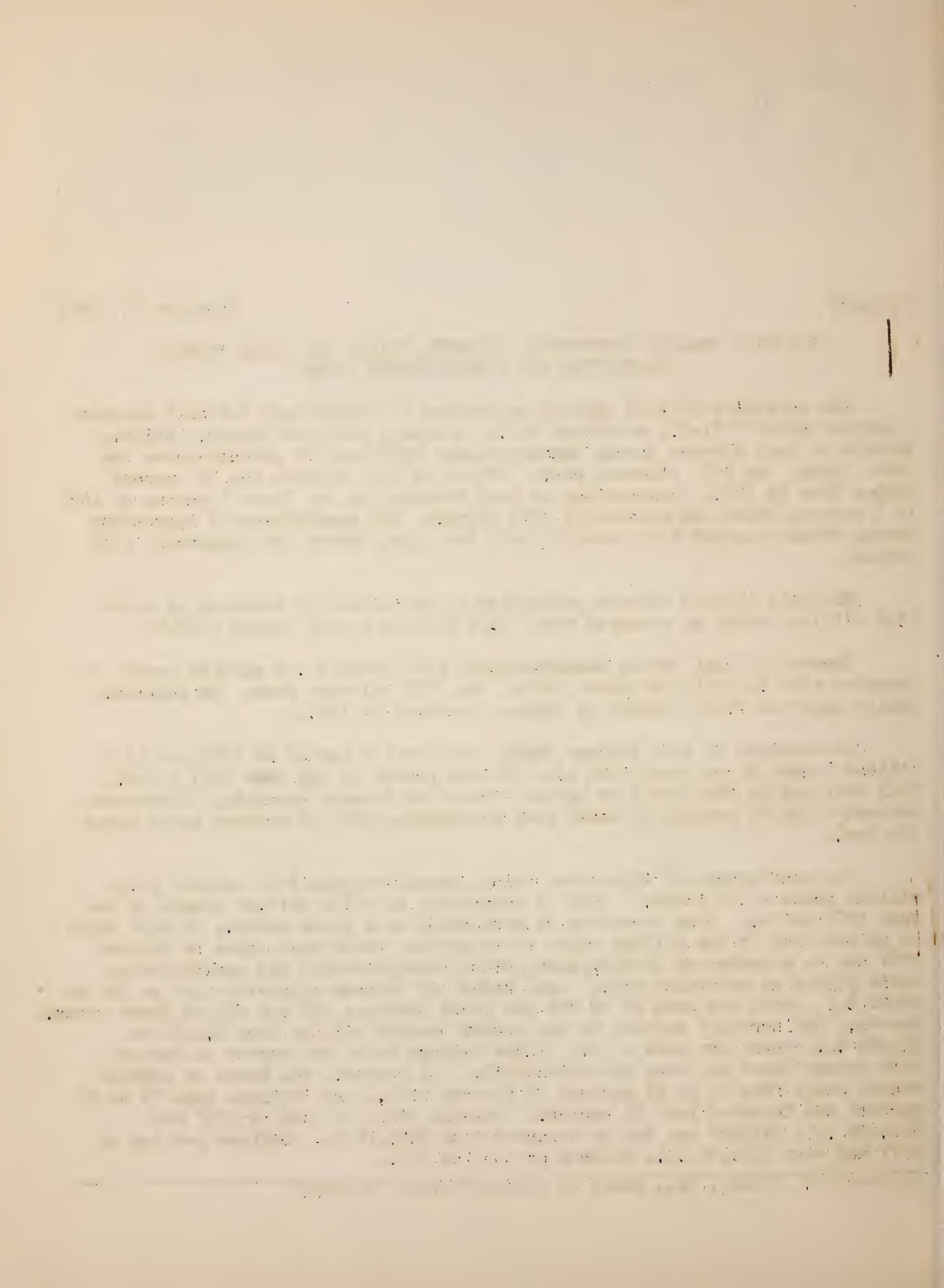
Mexico's 1952-53 tobacco production is preliminarily forecast at about 63.0 million pounds as compared with 57.7 million pounds during 1951-52.

Imports of leaf during January-August 1952 totaled 1.8 million pounds as compared with 2.1 million pounds during the 1951 calendar year. In addition, Mexico imported 87,659 pounds of tobacco products in 1952.

Consumption of leaf tobacco during the first 8 months of 1952 was 43.3 million pounds as compared with 45.2 million pounds in the same 1951 period. This decrease is attributed to higher prices for tobacco products. Cigarettes accounted for 96 percent of total leaf consumption with 95 percent being domestic leaf.

The manufacture of cigarettes during January-August 1952 totaled 955.3 million packs of 20 pieces. This is comparable to 961.4 million pounds in the same 1951 period. This reduction is attributed to a slack market, brought about by an increase in the selling price of cigarettes which took place in October 1951 due to a number of factors, among which transportation and manufacturing costs played an important role. Some brands of Mexican cigarettes are as low as \$0.02 U.S. cents per pack of 20 but the price increase did not affect these brands. However, the increase applied to the popular brands selling from \$0.052 to \$0.086 U.S. cents per pack of 20. Since Mexican taxes are geared to factory cost prices these too rose proportionately. At present, the taxes on popular brands range from 39 to 48 percent of factory price, for Virginia type 53 to 55 percent and imported leaf 56 percent. Average price of leaf in 1952 was \$422.63 U.S. dollars per ton as compared with \$344.74 U.S. dollars per ton in 1951 and only \$339.80 U.S. dollars per ton in 1950.

By George W. Thomas, Jr., based on Foreign Service Reports.





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

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PL FT 14-52

December 5, 1952

CANADA'S LARGE TOBACCO CROP CREATES PROBLEM

Canada's 1952 unexpected large flue-cured tobacco crop of 127.5 million pounds creates a serious marketing problem. Acreage for the 1952 crop was restricted because of large stocks on hand, decreased domestic cigarette consumption, and the drastic curtailment of proposed purchases from the 1952 crop by the United Kingdom. However, high yields, (1,524 pounds per acre in 1952 compared to 1,293 in 1951) offset the planned reduction and Canada now has about 50 million pounds of tobacco surplus available for export. Since the United Kingdom is reported to be planning to take only 8.5 million pounds from the 1952 crop, Canada is seeking new markets for the surplus leaf. Canadian tobacco exports during 1951, chiefly to the United Kingdom totaled 40 million pounds.

The unexpected large flue-cured crop further swelled the leaf stock which is shown in the following table along with production, withdrawals and total cigarette consumption.

CANADA: Flue-cured stocks, production, withdrawals,
cigarette consumption

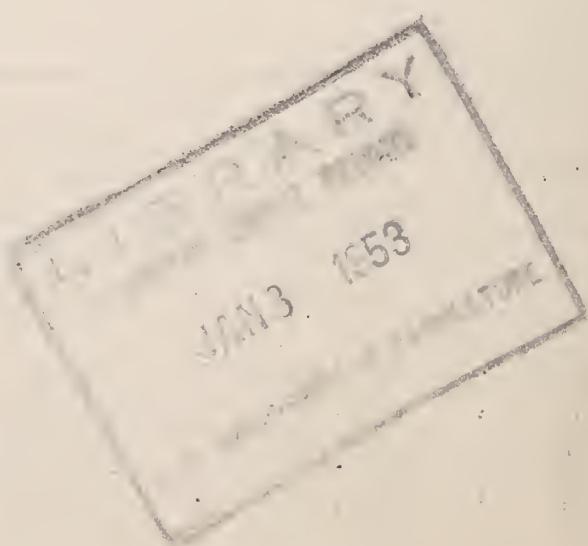
Year	Stocks on June 30 of year shown:	Production Farm sales weight	Withdrawals <u>1/</u> Crop year ending June 30	Cigarette Consumption Year ending Sept. 30
	1,000 pounds	1,000 pounds	1,000 pounds	Million cigarettes
1948	112,000	102,442	-	15,801
1949	122,000	116,668	-	16,699
1950	135,000	108,298	74	17,462
1951	134,000	135,850	67	15,664
1952	149,000	127,500	66	17,535

1/ Dry weight.

Office of Foreign Agricultural Relations, based on reports from U. S. Foreign Service Officers.

The volume of cigarettes on which taxes were paid in the crop year 1950-51 were lower than 1949-50 and 1951-52 due to higher taxes imposed in the spring of 1951 and a strike in August and September 1951. The tobacco industry predicted a substantial decrease in consumption as a result of higher excise taxes. However, this prediction was not reflected in the 1951-52 volume of cigarettes on which revenue was paid, which slightly exceeded the 1949-50 record year.

Production of leaf other than flue-cured in 1952 is estimated as follows: Burley 2.0 million pounds; dark 1.4 million; cigar 2.0 million; and pipe 1.5 million pounds. This compares to the 1951 estimate of 3.6 million pounds of Burley; 1.3 million pounds of dark; 3.7 million pounds of cigar; and 1.1 million pounds of pipe tobacco.





FOREIGN AGRICULTURE CIRCULAR

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FT 15-52

December 8, 1952

WORLD TOBACCO PRODUCTION FORECAST 2 PERCENT LOWER

The world's 1952-53 (July 1952 through June 30, 1953) tobacco harvest is now forecast at 7,196 million pounds as compared with 7,371 million pounds in 1951-52 and postwar (1945-49) annual average of 6,799 million pounds. A 1952-53 forecast excluding the Soviet Union, China, and most of Eastern Europe is 5,298 million pounds. This compares with the 1951-52 estimate of 5,440 million pounds and a postwar annual average of 4,845 million pounds.

This world forecast is only for countries shown and does not include tobacco produced in other countries which is consumed domestically and is of little importance. This forecast also includes production in the Torrid and South Temperate zones for the 1952-53 harvests which occur during the first half of 1953. Therefore, world production may vary considerably from the above forecast.

A substantial decrease in North America and Europe largely accounted for the lower forecast which is partially offset by moderate increases in the other continents. The decrease in production in both the United States and Europe is attributed primarily to widespread drouth conditions.

Decreased production in the 1952-53 crop is not reflected in consumption trends as consumption has increased in many of the large consuming countries. With better economic conditions now prevailing as compared with a year ago, many countries are using more and better quality leaf. However, restricted use of dollars in many countries will tend to limit purchases of United States tobaccos.

The 1952-53 production of flue-cured leaf, the principal type entering world trade, will be smaller than the 1951-52 harvest. The decrease in flue-cured production in the United States, by far the largest single producing country, is primarily the reason for the smaller world crop, as increases are indicated for Southern Rhodesia, India, Pakistan.

The 1952-53 harvest of Oriental or Turkish type leaf, another important type entering world trade, will be below the 1951-52 estimate, as decreases have been reported in practically all countries producing this type of leaf except Turkey, which shows only a slight increase. The decrease in Greece, Yugoslavia, and Italy is attributed to smaller acreage combined with lower yields this season due to unfavorable weather conditions. While the production of this type of leaf is lower, the quality is above average.

World production of light air-cured types including Burley, which represents an important portion of total production in many countries, is forecast slightly lower in 1952 because of moderate decreases in the major producing areas. This decrease is also attributed to drouth conditions. The production of dark air-cured types, other than strictly cigar types, is expected to be about the same level as 1951-52. A decrease is indicated for the United States. Production of cigar types may be slightly higher as increases are forecast for Cuba, the Dominican Republic and Indonesia, which should more than offset the decrease in the United States and the Philippine Republic.

North America. Canada's 1952 crop is estimated at 135.4 million pounds as compared with 153.8 million pounds in 1951. This decrease in production was not comparable to the decreased acreage program for 1952, as yields per acre during this season were 1,524 pounds as compared with 1,293 pounds in 1951. This is attributed primarily to the unusually favorable growing conditions and a more liberal use of fertilizer. Not only did Canada have a high-yielding crop but also a good-quality crop. In contrast, the United States crop is forecast as of November 1 at 2,231 million pounds as compared with 2,328 million pounds in 1951. This decrease is attributable primarily to widespread drouth conditions in most tobacco producing areas. The quality of some types of United States tobacco, especially flue-cured and Burley, have been reported at below average. The estimated production for flue-cured leaf in 1952 is 1,389 million pounds as compared with 1,452 million pounds in 1951. Burley decreased to 607.1 million pounds in 1952 as compared with 616.5 million pounds in 1951. Maryland decreased to 39.2 million as compared with 41.6 million in 1951. Fire-cured types show a decrease of slightly over 3 million pounds from nearly 59.5 million pounds in 1951 to 56.4 million in 1952. Dark air-cured decreased almost 1 million pounds from 31.7 million pounds in 1951 to 30.5 million this season. Cigar leaf production in 1952 is estimated at 109.0 million pounds as compared with 126.6 million pounds in 1951.

The 1952-53 leaf production in the Caribbean and Central American countries is expected to be slightly larger than in 1951-52. Cuban and Mexican leaf production in 1952-53 is expected to be about 9 percent above 1951-52, while the Dominican Republic and Puerto Rico also show slight increases.

Europe. The European leaf production, excluding Soviet Russia, is estimated at 658.5 million pounds as compared with 832.7 million pounds in 1951. Decreases were reported in practically every European country due to lack of rain during the growing season in the major producing areas. It has been reported that the quality of the leaf in Germany, France, and Italy is below the quality of last year's crop.

Soviet Union. No recent official reports have been received to indicate Russia's 1952 tobacco crop; however, unofficial reports indicate production at about 450 million pounds, or the same as in recent years but still about 14 percent below the 1935-39 annual average of 525.0 million pounds.

Asia. Total tobacco production in Asiatic countries is forecast at 2,820 million pounds for 1952-53 as compared with 2,783 million pounds in 1951-52 and a postwar annual average (1945-49) of 2,752 million pounds. Increases in production occurred in practically every listed country except Burma and the Philippine

TOBACCO: Estimated production in specified countries, average 1935-39, 1945-49, crop year 1951 and 1952 1/

SOUTH AMERICA:									
Argentina	34	57	92	100	928	985	841	31,558	56,173
Brazil	237	315	387	409	851	746	687	202,703	235,094
Chile	9	7	8	8	1,846	1,944	1,724	16,618	13,610
Colombia	37	42	51	52	4/	803	293	29,706	41,691
Estimated total 2/	317	421	538	569	-	-	-	280,585	346,568
AFRICA:									
Algeria	56	59	76	68	691	614	542	684	38,667
Nyasaland	57	80	85	85	286	323	315	244	16,311
French Morocco	1	3	5	6	1,040	1,212	825	753	3,748
Madagascar	4/	19	8	21	20	764	644	530	500
Northern Rhodesia	4/	4	13	27	35	4/	472	400	4/
Southern Rhodesia	51	119	194	195	507	638	597	500	26,061
Union of South Africa	4/	41	85	80	85	4/	500	508	530
Estimated total 5/	229	367	488	494	-	-	-	122,135	194,621
OCEANIA:									
Australia	10	4	8	10	532	826	957	900	5,276
New Zealand	2	4	4	4	787	1,131	1,364	1,250	1,457
Estimated total 5/	12	8	12	14	-	-	-	6,733	7,833
Subtotal (excl. of U.S.S.R.)									
China, and Eastern Europe	5,427	5,401	6,012	6,001	-	-	-	4,495,811	4,844,205
Estimated total for countries shown 5/	7,366	7,535	8,025	8,004	-	-	-	6,798,749	7,370,870
									7,195,885

^{1/} Year beginning July 1. For North temperate zone countries, harvests July through October of the year shown; for all other countries, harvests November and December of the year shown and January through June of the following year. ^{2/} Yields are calculated from detailed acreage and production estimates rather than estimates rounded to the nearest thousand. ^{3/} Does not include tobacco produced in several countries of the area which is consumed indigenously and is of minor importance. ^{4/} Preliminary. ^{5/} Less than a 5-year average. ^{6/} Data for 1935-39 not comparable with subsequent years. Data for 1951 and 1952 are post-war areas. In the case of Germany, postwar data are for Western Germany only. In the case of China, postwar data do not include Manchuria. In India and Pakistan, due to changes in the method of estimating acreage and production, postwar data are believed to be more accurate than prewar. ^{7/} Includes Albania, Bulgaria, Czechoslovakia, Hungary, Poland, and Romania. ^{8/} Separate data not available for 1935-39.

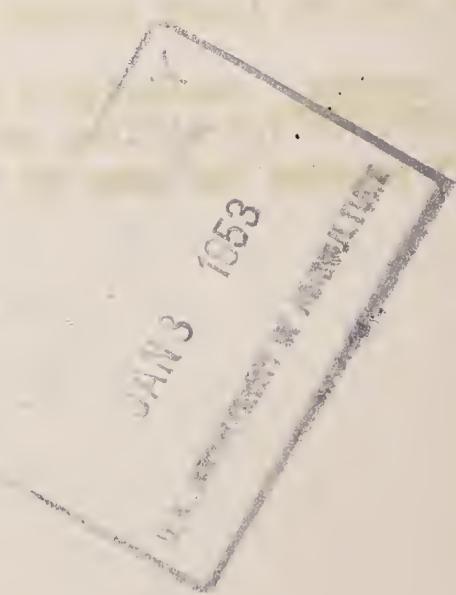
Office of Foreign Agricultural Relations. Official estimates of foreign countries, reports from U. S. Foreign Service Officers, results of office research, and other information.

Republic, which decreased slightly. Fragmentary information on China indicates that leaf production is about 1,250 million pounds, which is the same as 1951 but still below the postwar annual average of 1,317 million pounds.

South America. Tobacco production in the 4 listed South American countries during 1952-53 is 425.9 million pounds as compared with 373.0 million pounds in 1951-52. Brazil's production, the largest South American producing country, is forecast at 280.9 million pounds as compared with 237.4 million pounds in 1951-52. Argentina, second largest producing country, is forecast at 85.0 million pounds for 1952-53 as compared with 77.4 million pounds. Colombia's 1952-53 production is placed at 46.0 million pounds as compared with the 45.0 million and Chile, 14.0 million in 1952-53 as compared with 13.2 million in 1951-52.

Africa. Total tobacco production of the countries listed in Africa for 1952-53 is placed at 244.0 million pounds as compared with 233.4 million pounds in 1951-52. Since drouth and other unfavorable growing conditions prevailed during the 1951-52 season in the major African producing areas, the 1952-53 crop is forecast higher on assumption that weather conditions will be favorable. The 1952-53 Southern Rhodesian crop is estimated at 100 million pounds as compared with the 97.5 million pounds produced in 1951-52. At present, much effort is being exerted in an attempt to increase yields per acre rather than expand the area planted to tobacco. The Union of South Africa's 1952-53 crop is at present placed at about 45.0 million pounds as compared with 40.1 million pounds in 1951-52. About 85 percent of the 1951-52 crop consisted of Orinoco type which is significant since most of the previous crops were of the Amarello type leaf. It is now expected that Orinoco leaf will replace part of the required leaf imports needed for blending purposes. This change to Orinoco type was encouraged by the Tobacco Industry Control Board offering producers higher prices for the lower yielding type leaf.

Oceania. Australia's 1952-53 production is placed at 9.0 million as compared with 7.8 million pounds in 1951-52, while New Zealand's forecast for 1952-53 remains the same as the 5.0 million pounds produced during 1951-52.





FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
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FT 16-52

December 11, 1952

THE PHILIPPINE REPUBLIC SETS TOBACCO IMPORT QUOTA.

A law was enacted in May of 1952 by the Philippine Government, known as Republic Act No. 698, to limit the importation of foreign leaf tobacco. This Act provided that the imports of foreign leaf tobacco would be progressively reduced until in 1954 and thereafter only 25 percent of the base year, calendar year 1950, would be imported. The sponsors of this law designed it to promote domestic production of flue-cured tobacco with the view of attaining self-sufficiency in this commodity.

Several questions arose regarding the implementation of the law which are discussed, together with the decision rendered by the Secretary of Justice of the Philippines, as follows:

1. Were the percentages of the 1950 importation, which would be granted entry, to be based on the value or the weight of foreign leaf tobacco imported during the base year? It has been determined that importations of this year and later years will be governed on the basis of weight of the importation of the base year.
2. Was the reduction applicable to 1952 to be based on the entire calendar year or only for the remainder of the year subsequent to the Act's effective date, May 9, 1952. The decision was that the law could not be applied ex post facto; therefore, all import licenses granted prior to May 9 were exempt for the restrictive provisions of the law.
3. Should actual importations or should quantities licensed for importation be the criterion for determining whether the import quotas for the specified years had been filled. To this question it was ruled that the quantities of leaf tobacco licensed should be the criterion for determining whether quotas had been filled in the calendar year, not the actual imports.

The following table shows the imports of the calendar year 1950 into the Philippines and estimated pounds for which import quotas may be allowed in 1952 and subsequent years:

<u>Year</u>	<u>Pounds</u>
1950	28,732,000
1952	22,978,000
1953	14,366,000
1954	7,183,000
1955	7,183,000

While the import quota for 1952 is supposed to be only 75 percent of 1950, the increase is due to the import licenses issued prior to May 9, 1952, the effective date of the law.

The production of flue-cured type tobacco in the Philippines in 1951 was approximately 750,000 pounds; in 1952 the production has been estimated at approximately 2,250,000. The 1953 crop will be planted in the month of December and no production estimate is available at this time; however, strenuous efforts reportedly are being made to materially increase the production during this crop year. The manufacturers in the Philippines are assisting the farmers by building or by financing the building of curing barns, furnishing seeds, and giving other production assistance. It has been forecast that the 1952-53 production of flue-cured tobacco will be over 3.5 million pounds.

During the postwar years, the Philippine Islands were importing large quantities of manufactured tobacco products, the largest of which was cigarettes. Beginning in 1949, a program was inaugurated to import the leaf tobacco and manufacture the cigarettes in the Islands. Tax-paid cigarettes manufactured in the Islands indicate that the cigarette industry used approximately 9,000,000 pounds of tobacco in 1950. Due to a further reduction of the imports of tobacco products, the strengthening in the internal revenue laws, and strenuous effort to eliminate the black market, it is now estimated that the cigarette industry in the Philippines is using tobacco at the rate of about 24,000,000 pounds a year. While 1952 usings show a material increase over 1950 they are expected to continue to rise.

The is no definite information available regarding stocks of cigarette tobacco, but the manufacturers report only 3 to 4 months' supply.

The following tables shows U.S. exports to the Philippine Republic of leaf tobacco and tobacco products and the U.S. imports from the Philippines of tobacco and tobacco products.

UNITED STATES: Exports of unmanufactured tobacco and tobacco products to the Philippine Republic, calendar year 1948-51, nine months 1952

(Declared weight)

TYPE	: Unit	:	:	:	:	1952
	: of	:	:	:	:	Ending
	: Quantity	: 1948	: 1949	: 1950	: 1951	: September
Leaf Tobacco	: (1,000 : pounds)	: 211	: 1,110	: 27,092	: 9,466	: 22,670
Chewing tobacco	: pounds	: 1,502,370	: 1,122,955	: 214,543	: 538,477	: 134,509
Smoking tobacco in packages	: pounds	: 178,384	: 109,722	: 20,976	: 29,970	: 19,300
Smoking tobacco in bulk	: pounds	: 0	: 20,025	: 0	: 273,155	: 0
Cigarettes	: 1,000 : pieces	: 11,574,535	: 7,422,363	: 1,526,630	: 1,214,240	: 1,291,530
Cigars and cheroots	: 1,000 : pieces	: 6	: 0	: 0	: 0	: 0

Office of Foreign Agricultural Relations. Compiled from official records of the Bureau of the Census, U.S. Department of Commerce.

Historically, the Philippines have been substantial producers of cigar types of tobacco, and in 1951 the production of cigar types of tobacco was only slightly under the prewar average. This is expected to be materially reduced in the next several years. However, due to the increased consumption and to the smaller exports of domestically produced cigar types, stocks of this type of tobacco are comparatively higher with the result that prices paid to producers

are materially below the previous years. Therefore, it can be expected that the farmers will either shift to the production of flue-cured type tobacco when adequate curing and handling facilities are available or to other agricultural crops.

UNITED STATES: Imports of leaf tobacco and tobacco products from the Philippine Republic, calendar year 1948-51, nine months 1952

(Declared weight)

Type	Unit	1948	1949	1950	1951	1952
	of					Ending
	Quantity					September
Cigar leaf	pounds	94,886	0	282,206	780,314	282,206
Scraps, stems	"	51,344	326,000	172,250	0	172,250
Cigars and cheroots	"	35,756	11,625	15,128	23,663	10,465
Cigarettes	"	0	0	0	0	0

Office of Foreign Agricultural Relations. Compiled from official records of the Bureau of the Census, U.S. Department of Commerce.

JAN 3 1953



FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

JAN 1 2 1953

FT 17-52

December 24, 1952

UNITED STATES UNMANUFACTURED TOBACCO EXPORTS HIGHER IN THE 1951-52 CROP YEAR 1/

Exports of unmanufactured tobacco during the 1951-52 crop year 1/ totaled 520.5 million pounds declared weight, or 11 percent above the 468.6 million pounds exported in 1950-51. The average postwar crop year (1947-48 through 1950-51) unmanufactured tobacco exports were 450.6 million pounds as compared with the prewar (1934-35 through 1938-39) crop year average of 429.7 million pounds.

UNITED STATES: Exports of tobacco by types 1951-52 crop year with comparisons 1/

(Declared Weight)

Type	Average	Average	1950-51	1951-52
	1934-35	1947-48	1950-51	1951-52
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Flue-cured	318,865	353,971	377,156	444,167
Burley	10,900	30,592	26,150	27,465
Maryland	5,189	7,791	8,092	6,311
Virginia fire-cured	9,503	5,958	4,836	4,209
Ky.-Tenn. fire-cured	51,389	25,052	30,119	20,163
One Sucker	886	3,269	3,599	1,740
Green River	3,030	1,791	2,324	2,190
Cigar leaf	1,380	10,780	6,213	6,354
Black Fat	8,974	4,514	4,355	4,216
Perique	129	65	38	51
Stems, trimmings, scrap	19,497	6,780	5,676	3,681
Total	429,742	450,563	468,558	520,547

See footnotes at end of circular.

Flue-cured Tobacco. Unusually large shipments of flue-cured leaf to the United Kingdom in 1951-52 (See flue-cured table) are primarily responsible for the increase in total exports. About one-third of the shipments to the U.K. were used for stock replenishment and does not reflect increased requirements. Several of the other countries also increased their imports of flue-cured tobacco from the United States, the most notable of which were the Philippine Islands, Italy, France, China, and Egypt.

Burley Tobacco appears to have established a larger export market in the postwar years than it enjoyed in the prewar era. While the postwar annual average is larger than either 1950-51 or 1951-52, it is due to the large shipments to Germany in 1948-49 and 1949-50.

Cigar tobacco exports from the United States of cigar leaf tobacco in the postwar era are continuing at a much higher level than the prewar period. Based upon the last two crop years, it appears that the U. S. may continue for some time to export cigar tobacco in quantities greater than in the prewar period.

July-September Quarter Exports Off. Exports of all types of leaf during July-September 1952 totaled only 111.3 million pounds as compared with 147.1 million pounds in the same 1951 period, a decrease of slightly over 24 percent. This decrease is primarily attributed to decreased takings of flue-cured leaf by the United Kingdom. It was partially offset by increased shipments to Western Germany, Indonesia, the Philippine Republic, and Japan.

The most outstanding favorable development during this quarter is the return of Japan as an export market, taking 6,166,000 pounds in this quarter. While Germany moved very large quantities of flue-cured and Burley during this period, it is due primarily to the fact that the necessary dollar exchange wasn't available early in the year to the German importers.

TOBACCO: U.S. exports in July-September 1952 with comparisons

(Declared weight)

Region	All Types	Flue-cured	Burley	Fire-cured	Dark Virginia	Ky. & Tenn.	Maryland	Virginia
U.K. & Ireland	81,911	18,038	81,848	17,981	10	0	25	55
Cont'l. Europe	42,803	62,107	30,422	46,632	4,154	8,154	2,450	2,397
Africa	5,584	4,146	1,996	1,929	80	262	1,100	546
Asia	9,885	19,917	9,124	18,821	268	389	93	250
Australia &								
New Zealand	4,930	4,214	4,846	4,048	2	0	25	37
Latin America	1,851	2,567	1,195	1,048	365	1,315	79	54
All other	116	280	43	182	0	1	34	41
Total	147,080	111,269	129,474	90,641	4,879	10,121	3,806	3,380
Green River	One Sucker	Black Fat	Cigar Leaf	Perique	Stems & Scrap			
U.K. & Ireland	0	0	1	0	18	1	10	0
Cont'l. Europe	73	0	1,296	10	0	2	1,773	1,534
Africa	71	49	413	300	1,286	751	119	6
Asia	0	0	0	0	0	48	349	0
Australia &								
New Zealand	0	0	0	0	0	5	2	0
Latin America	0	0	30	12	11	15	76	79
All other	0	0	0	0	13	12	26	44
Total	144	49	1,739	323	1,310	780	2,065	2,015

Exports by Types

Flue-cured. Exports of this type of leaf during the 1951-52 crop year (July-June) totaled 444.2 million pounds, or 18 percent above the 377.2 million pounds exported in 1950-51. The 1951-52 exports of flue-cured leaf were exceeded only by the crop year 1946-47 when 480.6 million pounds were exported. The United Kingdom, the most important 1951-52 export outlet, took 215.5 million pounds as compared with 147.1 million pounds in 1950-51 and a postwar (1947-48 through 1950-51 crop year) average of 143.8 million pounds. Germany, the second most important flue-cured market in 1951-52, took 41.4 million pounds as compared with 60.2 during 1950-51.

Nineteen of the countries listed in the following flue-cured table show increased takings in 1951-52 over the postwar yearly average. While only 9 of the listed countries show decreases, the greatest decreases were shown by China, the Netherlands, India, and Austria. Flue-cured exports in total for 1952-53 are expected to drop sharply. The United Kingdom is restricting its imports of U. S. tobacco; however, some of the other markets are expected to increase their takings, notably Germany and Japan.

UNITED STATES: Exports of flue-cured tobacco, crop year 1951-52
with comparisons, by country of destination 2/

Country of Destination	(Declared weight)					3 months (July-Sept.) 3/
	Averages		1950-51	1951-52 3/	1952 3/	
	1934-35 1938-39	1947-48 1950-51	1,000 pounds	1,000 pounds	1,000 pounds	
Argentina	871	1,138	777	18	-	
Australia	18,233	18,854	18,478	19,280	2,018	
Austria 4/	20	3,470	4,518	2,626	-	
Belgium	3,575	14,101	17,748	18,962	1,997	
British East Africa and Mauritius						
Ceylon	178	1,099	1,038	1,627	725	
China 5/	874	938	944	1,304	300	
Denmark	38,025	11,374	2,341	4,329	610	
Egypt	2,237	7,108	8,020	6,296	2,975	
Finland	854	2,347	1,213	3,078	992	
France	1,021	1,774	2,676	2,651	661	
French Indo China and French India	1,210	1,396	2,171	3,315	92	
Germany 4/	136	1,663	2,046	1,947	761	
India	4,012	41,243	60,156	41,447	27,607	
Indonesia	2,690	6,541	6,167	4,313	186	
Ireland	1,810	6,775	10,877	10,270	4,201	
Italy	6,108	16,955	17,781	18,517	3,588	
Japan	98	3,767	1,254	2,178	38	
Netherlands	5,542	290	1,159	1,940	6,166	
New Zealand	6,772	23,481	22,446	17,174	6,358	
Nigeria	2,449	5,235	5,842	6,277	2,030	
Norway	169	755	1,064	1,700	105	
Portugal	2,095	4,640	3,949	3,342	1,032	
Philippine Republic	768	3,282	2,072	2,958	434	
Sweden	623	7,795	4,115	22,029	5,271	
Switzerland	3,265	5,680	9,342	8,213	3,747	
Thailand (Siam)	174	4,046	5,149	3,945	976	
United Kingdom	3,099	3,199	5,734	5,859	973	
Other Countries	203,053	143,803	147,113	215,523	14,393	
Total	8,904	11,222	10,966	13,049	2,405	
	318,865	353,971	377,156	444,167	90,641	

See footnotes at end of circular.

Virginia Fire-cured tobacco exports during the 1951-52 crop year totaled 4.2 million pounds, or 13 percent below the 4.8 million pounds reported in 1950-51 and 30 percent below the postwar average of 6.0 million pounds. Norway, the chief 1951-52 outlet, took 1.1 million pounds. Only two of the countries listed in the table below show increased takings in 1951-52 over the postwar annual average. A downward trend in export of this type leaf is indicated.

UNITED STATES: Exports of Virginia Fire-cured tobacco,
crop year 1951-52 with comparisons
by country of destination 2/

Country of Destination	(Declared weight)				
	Averages				
	1934-35	1947-48	1950-51	1950-51	1951-52 <u>3/</u>
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Austria <u>4/</u>	92	200	0		759
Belgium	419	288	91		81
Germany <u>4/</u>	1,093	278	141		469
Netherlands	459	581	259		-
Norway	2,024	1,825	1,989		1,123
Portugal	361	78	67		40
Sweden	1,030	734	423		356
Switzerland	121	539	603		404
United Kingdom	1,500	455	543		208
Other Countries	2,404	980	720		769
Total	9,503	5,958	4,836		4,209

See footnotes at end of the circular.

Kentucky-Tennessee Fire-cured leaf exports for 1951-52 crop year totaled only 20.2 million pounds as compared with 30.1 million in 1950-51 and the post-war crop yearly (1947-48 through 1950-51) average of 25.1 million pounds. Decreased takings occurred in many importing countries; however, the largest decrease was in France, which dropped from 6.4 million pounds in 1950-51 to zero in 1951-52. The dollar shortage again was responsible for France taking no fire-cured leaf. Six of the 20 countries listed in the following table show increased takings in 1952-53 over the postwar annual average, including the United Kingdom and Netherlands. A downward trend in exports of this type leaf is also indicated.

UNITED STATES: Exports of Kentucky-Tennessee Fire-cured tobacco crop year 1951-52 with comparisons by country of destination 2/

Country of Destination	(Declared weight)				1951-52 3/	
	Averages		1950-51			
	1934-35 1938-39	1947-48 1950-51				
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	
Algeria and Tunisia	772	832	792		800	
Belgium	4,867	2,235	3,248		1,448	
Denmark	1,099	638	513		337	
France	18,320	5,411	6,418		0	
French Africa 6/	642	843	1,731		223	
Germany 4/	3,366	1,163	453		1,010	
Gold Coast and Nigeria	122	325	508		457	
Ireland	737	652	749		949	
Italy	476	768	0		649	
Malta, Gozo, and Cyprus	141	205	713		0	
Netherlands	4,646	3,879	4,029		6,103	
Norway	543	349	291		303	
Portugal	1,139	426	304		363	
Spanish Africa and Canary Islands	564	214	346		134	
Sweden	2,339	1,633	1,666		353	
Switzerland	2,113	2,623	3,468		1,433	
United Kingdom	2,746	946	1,480		2,450	
Other countries	6,807	1,910	3,410		3,151	
Total	51,389	25,052	30,119		20,163	

See footnotes at end of the circular.

Burley. The export market for Burley tobacco seems to be fairly well established, according to the postwar statistics. The 1951-52 Burley exports totaled 27.4 million pounds as compared with 26.2 million pounds in 1950-51 and a 30.6 million pound postwar crop year average. The prewar (1934-35 through 1938-39) average was only 10.9 million pounds. During 1951-52, Germany, the most important market outlet, took 2.8 million pounds more than in 1950-51; Belgium, the second most important outlet, took 0.8 million pounds more than in 1950-51. The statistics in the table below indicate fairly sound export markets have been established in Austria, Belgium, the Scandinavian countries, Germany, Egypt, and Mexico. However, the exports to Portugal in 1951-52 are materially below the postwar annual average and 1950-51.

UNITED STATES: Exports of Burley tobacco
crop year 1951-52 with comparisons
by country of destination 2/

Country of Destination	(Declared weight)			
	Averages			
	1934-35	1947-48	1950-51	1951-52 3/
	1938-39	1950-51		
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Algeria and Tunisia	212	235	68	123
Argentina	165	586	247	56
Australia	572	138	63	127
Austria 4/	17	913	1,136	1,204
Belgium	2,454	3,583	2,389	3,184
Denmark	854	1,669	1,557	1,247
Egypt	22	865	681	905
France	214	271	650	974
Germany 4/	474	7,269	5,613	8,402
Italy	242	651	476	24
Mexico	99	1,072	1,323	1,540
Netherlands	982	2,610	1,089	795
Norway	412	1,210	1,095	977
Sweden	499	1,456	2,015	2,031
Switzerland	46	506	685	618
United Kingdom	262	610	283	330
Portugal	2,383	5,033	3,502	2,366
Other countries	991	1,915	3,278	2,562
Total	10,900	30,592	26,150	27,465

See footnotes at end of circular.

Maryland type leaf exports totaled 6.3 million pounds in 1951-52 as compared with 8.1 million pounds in 1950-51 and a postwar average of 7.8 million pounds. Two of the 6 countries listed in the following table show increases over the postwar yearly average, while the other 5 countries listed show decreases. Exports of this type leaf have become relatively stable over a period of years.

UNITED STATES: Exports of Maryland tobacco
crop year 1951-52 with comparisons
by country of destination 2/

(Declared weight)

Country of Destination	Averages			1950-51	1951-52 <u>3/</u>
	1934-35	1947-48	1950-51		
	1,000 pounds	1,000 pounds	1,000 pounds		
Algeria and Tunisia	330	366	258		458
Belgium	395	235	153		264
France	657	324	1,049		5
French Morocco	49	502	652		278
Germany <u>4/</u>	195	368	323		135
Netherlands	1,776	496	395		294
Switzerland	1,412	5,158	4,667		4,682
Other countries	375	342	595		195
Total	5,189	7,791	8,092		6,311

See footnotes at end of circular.

One Sucker leaf exports in 1951-52 were only 1.7 million pounds as compared with 3.6 million pounds in 1950-51. This sizeable decrease was caused by smaller exports to practically every country with the exception of French Africa, which increased slightly.

UNITED STATES: Exports of One Sucker tobacco
crop year 1951-52 with comparisons
by country of destination 2/

Country of Destination	(Declared weight)			
	Averages			
	1934-35	1947-48	1950-51	1951-52 3/
	1938-39	1950-51		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Belgium	609	266	525	325
French Africa	65	185	91	103
Germany 4/	13	91	14	0
Gold Coast and Nigeria	35	932	1,385	1,149
Liberia	12	95	72	7
Netherlands	14	300	195	13
Other countries	138	1,400	1,317	143
Total	886	3,269	3,599	1,740

Green River type leaf exports for 1951-52 totaled 2.2 million pounds as compared with 2.3 million pounds in 1950-51. The postwar crop year average is 1.8 million pounds, whereas the prewar average was 3.0 million pounds.

UNITED STATES: Exports of Green River tobacco
crop year 1951-52 with comparisons
by country of destination 2/

Country of Destination	(Declared weight)			
	Averages			
	1934-35	1947-48	1950-51	1951-52 3/
	1938-39	1950-51		
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Belgium	740	223	280	230
French Africa 6/	80	27	21	26
Ireland	137	47	0	40
Liberia	0	227	302	105
Netherlands	37	272	0	178
United Kingdom	1,952	424	838	1,278
Other countries	84	571	883	333
Total	3,030	1,791	2,324	2,190

See footnotes at end of circular.

Cigar Leaf exports during 1951-52 totaled 6.4 million pounds, which is slightly above the 1950-51 total of 6.2 million pounds. However, both years are considerably below the postwar crop year (1947-48 through 1950-51) average of 10.8 million pounds. This average was higher due to larger shipments in 1948-49 and 1949-50 to Germany, which was also the largest 1951-52 cigar leaf outlet, taking 3.3 million pounds, or 51 percent of the total. The Netherlands ranked second, with slightly over 0.5 million, and Austria, third, with 0.5 million pounds. The cigar leaf tobacco export market seems to be steady unless more unfavorable economic conditions develop in the important cigar leaf importing countries in the near future.

UNITED STATES: Exports of cigar leaf tobacco
crop year 1951-52 with comparisons
by country of destination ^{2/}
(Declared weight)

Country of Destination	Averages				1951-52 ^{3/}
	1934-35	1947-48	1950-51	1951-52	
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	
Algeria and Tunisia	1	1,020	616	323	
Austria ^{4/}	2	346	96	501	
Belgium	114	603	876	488	
Canada	77	382	357	310	
Denmark	0	907	685	136	
Germany ^{4/}	347	5,326	2,214	3,312	
Netherlands	86	886	758	524	
Philippine Republic	447	92	58	20	
Sweden	0	277	121	37	
Switzerland	0	138	50	16	
United Kingdom	136	36	28	3	
Other countries	170	767	354	684	
Total	1,380	10,780	6,213	6,354	

See footnotes at end of circular.

Black Fat exports for the 1951-52 crop year totaled 4.2 million pounds, which is slightly below the 4.4 million exported in 1950-51. The Gold Coast and Nigeria, the most important export outlets for many years, still led in 1951-52 by taking 2.8 million pounds, or 67 percent of total exports. French Africa retained second place in importance, taking 0.9 million pounds.

UNITED STATES: Exports of Black Fat, Water Baler and Dark African tobacco crop year 1951-52 with comparisons by country of destination 2/

Country of Destination	(Declared weight)			
	Averages			
	1934-35	1947-48	1950-51	1951-52 <u>3/</u>
	1938-39	1950-51		
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
British West Indies <u>7/</u>	153	81	57	62
French Africa <u>6/</u>	2,742	729	1,044	899
Gold Coast and Nigeria	4,511	3,222	2,860	2,824
Liberia	222	24	24	0
Netherlands Antilles	73	38	36	39
Portuguese Guinea and Angola	327	268	290	273
Spanish Africa and Canary Islands	172	35	39	99
Other countries	774	117	5	20
Total	8,974	4,514	4,355	4,216

Perique exports totaled 51,000 pounds in 1951-52, or 34 percent above the 38,000 pounds in 1950-51.

UNITED STATES: Exports of Perique tobacco crop year 1951-52 with comparisons by country of destination 2/

Country of Destination	(Declared weight)			
	Averages			
	1934-35	1947-48	1950-51	1951-52 <u>3/</u>
	1938-39	1950-51		
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Canada	22	13	0	0
Norway	11	18	18	5
United Kingdom	89	23	13	33
Other countries	7	11	7	13
Total	129	65	38	51

See footnotes at end of circular.

Stems, Trimming and Scrap exports during 1951-52 totaled 3.7 million pounds as compared with 5.7 million pounds in 1950-51. The decrease is primarily attributable to China, which did not take any in 1951-52 in contrast to the 1.9 million pounds in 1950-51. Other countries taking stems, trimmings, and scrap tobacco in 1951-52 included Belgium, Denmark, Germany, Norway, Sweden, Western Germany, and the Netherlands.

UNITED STATES: Exports of stems, trimmings and scrap tobacco
Crop year 1951-52 with comparisons
by country of destination 2/

Country of Destination	(Declared weight)				1951-52 3/
	Averages		1950-51	1951-52	
	1934-35 1938-39	1947-48 1950-51	1,000 pounds	1,000 pounds	
Belgium	169	44	123	43	
China 5/	15,505	3,955	1,852	0	
Denmark	191	332	266	182	
French Morocco	0	126	210	370	
Germany 4/	1,426	224	395	232	
Netherlands	23	410	507	203	
Norway	108	134	207	287	
Sweden	1,087	890	851	1,103	
Tangiers	0	247	292	447	
United Kingdom	215	58	0	0	
Other countries	773	360	973	814	
Total	19,497	6,780	5,676	3,681	

1/ July 1951-June 1952 for flue-cured, October 1951-September 1952 for all other types.

2/ Shipment of leaf tobacco to Puerto Rico, principally cigar leaf averaging 1 to 3 million pounds annually are not included in this table.

3/ Preliminary.

4/ Austria included with Germany for period of May 1938 through September 1939.

5/ Includes Hong Kong and Kwangtung.

6/ Includes French Morocco, Cameroons, French West Africa and French Equatorial Africa.

7/ Includes the Bahamas, Barbados, Jamaica, Leeward and Windward Islands, and Trinidad and Tobago.

Compiled from official records of the Bureau of the Census by the Office of Foreign Agricultural Relations.

